Sales and Distribution Management
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Lecture – 22
Sales Force Management Job Analysis

Start.

[FL]. Today, we will be beginning with our discussion on a very you know exhaustive a topic which is Sales Force Management. This particular topic will spread over several lectures, we will be talking about sales force management, you know and we will discuss in detail job analysis, recruitment, selection, training, performance appraisal, compensations. So, this is a topic which will actually you know we discussed over several lectures and under different heads and it is a big of chunk or a big component of our course on Sales and Distribution Management.

Now, we shall today with this begin the sales force and discussion on sales force management and this is lecture 22 and this is the second lecture in the fifth module on this course on sales and distribution management. So, let us today first start with the first component of sales force management which is job analysis.

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So, what are the different topics, we shall be covering? We shall be talking about the meaning and definition of a sales job analysis. We will be discussing the importance of a sales job analysis; the purpose as to why these activities undertaken and then, we will discuss on the outcomes of a sales job analysis which is the job description and the job specification. So, now let us start with the first you know sub topic here which is the meaning and definition of a sales job analysis.

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Now, job analysis has been defined as a process by with by which data with respect to a particular job or a particular position is systematically collected and analysed. We all know that in an organisation we have different kinds of jobs; there are you know which of course, can be arranged in you know different categories as senior, middle, lower you know positions in the organisations.

So, we have senior management; we have middle management; we have lower management; we have blue collared workers; we have white collared workers. We have workers and you know people who are working in organisation with different kinds of job and role requirements, they have different kinds of duties responsibilities and they required different kinds of qualifications and skills to perform those different jobs in satisfactorily.

Now, we have to understand that every job in an organisation is important and that is why it exists; if a particular job of a particular role or a position, it was not important or was not significant. Then, it would not exist in an organisation.

So, we have to understand that every task is significant and important for an organisation and when we decide on the kind of people would be would we would require to perform jobs or the number of people who would be needed to perform a certain roles, we have to go in for a very exhaustive exercise which is a job analysis. Now job analysis helps us you know collect data and describe the nature and content of a job as well as the skills, the qualification, the experience needed in a person to be able to perform the job satisfactorily.
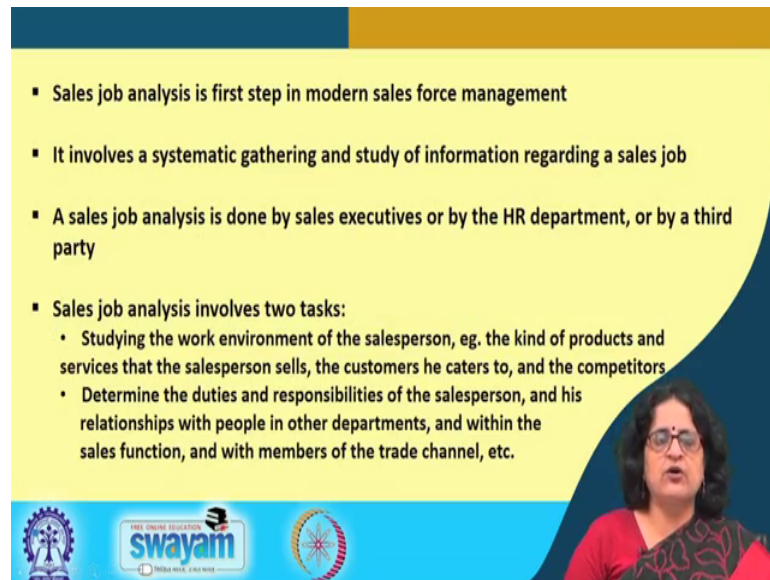
So, in order to you know ensure that there is a person job fit and we have the right kind and the right number of people performing a particular job. It is very essential that the that company is going for a job analysis and the going for this huge exercise, where they have to analyse each and every job in the organisation and study it in terms of the roles, the responsibilities, the duties to be performed, the task, the activities as well as the different kinds of skills qualifications experience required. So, a job analysis is defined as a process by which data with respect to each of the job is systematically collected and described.

So, it would define the content of a job, the components of the job and the circumstances and the environment in which it is to be conducted. It also specifies the minimal knowledge, the skills and abilities required for performance of a job. So, it helps assign such jobs to people that would match with their skills effectively, that would match with their qualifications with their skills, with their abilities, even with their physical characteristics effectively so that there could be a person job fit.

So, it is very very important that organisations going for this exercise of studying the jobs and then, you know deciding on the number of people or the kind of people required. Also you know coming to who would be you know the right kind of person for the job and whose qualifications and scales would actually match the role requirements of the job perfectly is something which will be which we which we would be able to do better, if we our organisation goes in for this particular exercise.

So, a job analysis defines the contents of a job, the components of a job and the circumstances and the environment in which the job must be performed. It also specifies the minimum knowledge skills and abilities required for performance of a job.

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Now, this is when we talk of a general you know scenario, but if we bring into it more specifically if we discuss these in the context of sales. So, sales job analysis is the first step in modern sales force management and it involves systematic gathering day of data and study of information regarding the sales job. So, it actually elaborates on you know the kind of sales jobs or nature of sales job the roles, the requirements and the qualifications and skills necessary so that the sale job can be performed in the best possible manner.

So, we regarded as the first step in sales force management and it would involve a systematic gathering and study of information regarding the sales job; systematic gathering of information and the studying of this information regarding the sales job. Now a sales job is done by sales executives or by the HR department or can also be done by a third party. So, it can be done by the sales executives in the sales department or it can be done by the HR department or it can also be outsourced to a third party and it would involve two tasks; one study the work environment of the sales person that is the kind of products and services that the sales person sells, the customers he caters to and the competitors he deals with. Also to determine the duties and responsibilities of the

sales person and its relationship with people in other departments and within the sales function; also his relationship with members of the trade channel etcetera.

So, here what it actually involves is studying the salespersons work environment in terms of the kind of products and services he sells, the kind of customer he caters to where b to b or b to c and the also the kind of competitive scenario that he faces and then also to determine the duties and responsibilities of the sales person and his relationship to people in other departments, to people in the same you know marketing and sales department also with members of the trade channel and so forth.

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Now, let us now come to the importance of a sales job analysis. Why is it important to go you know into this exercise of a sales job analysis. Now a sales job analysis will help determine the nature and importance of the job; the duties and responsibilities. It will also elaborate you know illustrate the reporting relationships who reports to whom, the superior subordinate relationships superior relationships.

So, it would clarify with sales people you know sales peoples roles as to when they would work in teams and how are the relationship would be when they are working in teams; when the this would change into more of a you know superior subordinate relationship and in that case who reports to whom and clear cut delineation of authority responsibility etcetera would be clarified if and goes in for a sales job analysis.

Also the sales job analysis would you know it kind of indicate the skills required for the job; the knowledge, the skills, the abilities the physical characteristics, in certain cases a physical abilities which means that the person has to be you know spacing a very stressful environment or a very hazardous environment. And, so he has to be physically sound, he must have certain you know if certain kind of physical characteristics to be able to bear stresses or you know you know walk a lot or you know kind of be able to bear the sun and the rain things like that which also refers to the working conditions for the sales person.

So, the nature and importance of the job, the duties the responsibilities, the educational qualifications required as well as you know working conditions in which he has to work. A clear cut demarcation of you know lines of authority who would be the subordinate; who would be the superior, all of this becomes very clear when you know we do a sales job analysis. Reporting relationships here mean that when you know when a sales person is working in the field and he has to report to the branch manager. So, what would be the you know as a branch manager's branches sales manager's role and responsibility must be defined.

Similarly, the salespersons role and responsibility must be defined. So, again the job analysis is done for a branch sales manager's job and another exercise is done for the salesperson's job. So, it will be clear you know cut demarcation can be made as to what is the role and responsibility of a branch sales manage and the kind of knowledge and skills he must possess; the kind of qualifications and experience he must possess. And the other hand, what are the roles and responsibilities of the sales person and what are the kinds of skills and abilities and qualifications he must possess.
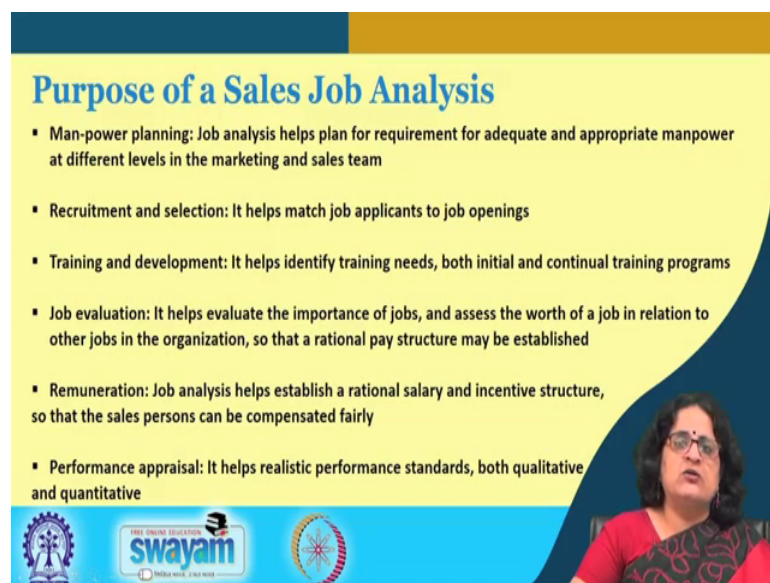
So, not only would the sales job analysis help discuss the nature and importance of the job or the job duties and responsibilities, but also clear cut demarcate you know the kind of functions and roles and responsibilities that are branch sales manager was performed as a superior and the kind of roles responsibilities with a salesperson must perform as a subordinate; so, the reporting relationships now. Sales job analysis a very helpful tool for the HR manager, while they going for recruitment and selection.

So, when we do recruitment and selection, we will see that this exercise in the case of the sales function is undertaken generally by both HR team and the sales team. Both get

together and recruit other sales force. So, the sales job analysis is very helpful for the HR manager while recruiting and selecting the right person on the sales job deciding on the needs for training of the scope or training required for the sales person; also deciding on the right kind of compensation plan the performance management systems etcetera.

So, once a sales job analysis is done, the HR team would be able to understand you know the kind of a you know recruitment and selection process is they have to design, the kind of compensation package they have to design, you know incentive systems the performance appraisal and the kind of training that would be required; both at the initial level as a fresh trainee and as well as on a continued basis over the entire life span as a sales you know career for the sales for the conduct of a particular job. So, this is why and how the sales job analysis is important in the sales function.

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Now, so coming a little more in detail and we will discuss here, with the purpose is of the purpose of a sales job analysis. So, first is it helps in Man-power planning. Now, job analysis help plan for requirement for the adequate inappropriate man-power at different levels in the marketing and the sales team. So, once a sales job analysis is done, keeping in mind the role requirement, keeping in mind the job you know this the HR team and you know we will be able to determine you know future man-power needs for the sales for the sales function to be performed in effective manner.

They would be able to understand the kind of people required and the number of people required specially in cases where you know the older staff is retiring or superannuating or being considered for a promotion to higher positions. So, in those cases where there will be a scenario where you know the older sales, the experience sales people are retiring superannuating.

There may be another situation where the people at the middle level or at the lower level are being considered for position that higher or middle level respectively. And so fresh trainees are required or fresh or new sales people at lower levels required. So, in this case through a job analysis, through a clear cut definition of the role and responsibility and the skills and the qualifications which are required to fill up you know these positions, the HR department would be better prepared to go in for you know this you know better recruitment and selection drive. So, also the sales t say the HR department would be able to understand the youth kind of people required and number and kind of people required.

Now, I would repeat here that you know when sales force is something you know if there is a shortage of sales force, either because of superannuation or because of a promotions you know in those cases, the HR department has to plan for both the adequacy and the appropriateness of the you know of a of people of who would fill up the various of solve sales jobs which are getting vacant.

So, in this situation job analysis will help them plan or decide on the adequacy an appropriateness of manpower at different levels in the marketing and the sales team. So, that the sales function can be performed efficiently. Another you know of reason why we must go in for a sale job analysis is recruitment and selection; as I just said that you know when you recruits are needed and you the company realises that it is in shortage of a people and in the sales function and it needs more people, again job analysis will help determine the kind of people required to fill up those positions.

And so, this would help ensure that the job applicants a match with the job openings and there can be a person job fit. Sales job analysis also helps determine training needs whether it is initial training needs or continual sales training programs. Sales job analysis also helps in a big way in job evaluation and job evaluation becomes very very important in the case of the sales function because it gets links it gets linked to the compensation and the reward plan.

Now, the sales function is something which is because of its peculiar nature in scope, demands that you know there are extra incentives or a you know benefits which are given to the sales team to keep them motivated on their job, but this is something which name may not always be welcome or acceptable by other people in other departments. There is always this you know question which is posed as to why should people in the sales or why should people in the marketing team be rewarded more or be given different kinds of incentives.

Now, in this scenario the job analysis acts as a very very vital tool to justify and logically explain as to why the sales team and a sales force need to be compensated differently to other members in the to the in comparison to other employees in the organisation. at This is again you know is done through job evaluation.

Now job evaluation helps evaluate the importance of the jobs and as the total worth of a job in relation to other jobs. So, that a rational pay structure can be established and because you know when we go in for a job analysis are the next step of job evaluation also becomes easy because once it is known that what are the different kinds of duties and responsibilities as well as the knowledge and skills required for to perform a particular sales job.

Once it is also known about you know the kind of working environment or the working conditions, the sales person will face. The job analysis will help you know the HR department evaluate it, you know with other jobs in the organisation and so, if the sales people being paid more would get justified because, the nature of the job the duties and responsibilities, the skills and qualifications required for them to be able to attend their targets or their you know in terms of sales is something which we will be very easily defined or explained.

So, because the HR people you know going for this exercise of job analysis and they are helped in this exercise by the marketing and sales for team, they get a vital tool again to which taken produce and use you know against those opponents who feel that the sales job or the sales function need not be you know compensated differently. Once a job analysis is done, once the evaluation has been done, you know the HR people can very easily explain to others that is the reasons behind sales team and the sales force being paid extra or compensated differently to others in the workplace.

So, the job evaluation exercise helps to evaluate the importance of the job in comparison to other jobs and so, rational pay structure may be established. But in order to actually do this, in order to establish a rational pay structure, job evaluation is necessary and for job evaluation to be conducted it is very important that a sales job analysis is done. So, what we are trying to say is that the sales job analysis helps you know in job evaluation and job evaluation would further you know be an answers to as to why a rational pay structure should be established something which is very different to an and sales people should be paid something which is very different to what others are being paid in the organisation.

So, this is again you know talking about not only the salary, but also the incentives. The sales job analysis also helps in performance appraisals. It helps in setting realistic job this as job performance standards whether they have qualitative standards or quantitative standards, there is the HR team and the marketing team can you know sit together and they decide on the various parameters or the performance standards on which people performing different sales roles and sales functions should be appraised.

So, this is again because of the nature of the sales job which is very very target oriented and sometimes the you know is very very challenging goals are set and sometimes even unrealistic goals are set. So, so keeping in mind this particular fact it is very important that you know performance appraisal is done carefully based on the standards and in order to have these sound standards sales job analysis again becomes important. So, what so, if you see sales job analysis helps in manpower planning, it helps in recruitment, it helps in selection because it clearly defines the number of people are needed you know the kind of people needed.

And so, it becomes very easy for the for the HR team, to recruit and select the right kind of people for the sales job. A sales job analysis also explains with a kind of training needs that would be required for people who are joining fresh or you know new are joining at lower levels in the organisation or at middle levels in the organisation. This training and development needs again would be and we be determined on the basis of the role requirements which are again defined by job analysis.

So, job analysis helps in training and development, it helps in job evaluation and through job evaluation the HR team can actually you know a counter you. So, the HR team can

logically explain a rational structure for the sales team and they can even counter arguments from others as to why people in the sales and marketing team should be compensated differently and of course, sales job analysis also helps in performance appraisal. Because it you know gives vital clues for while setting standards with respect to what the kind of you know duties, responsibilities, the nature of the job and skills which are required typically to perform the sales job. So, that is why sales job analysis is very important and it has to be conducted in the organisation.

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Now, what are the outcomes of a sales job analysis? When we speak of a job you know job analysis and its outcomes, we talk of two things which is sales job description and sales of pacification. The job description delineates the nature of the of the job, the scope of the job as well as a duties and responsibilities associated with the job and job specification explains the minimum skills and qualifications that are required in a person to perform the job satisfactory. Now this will help hire the right person for a sales position.

So, if we see in sales job specifications will help us in recruitment, in selection, in determining training needs and sales job description a will help us you know setup performance standards you know you know and of course, this the compensation and reward plan and during job evaluation.

So, what we saw in the previous slide and what we discussed, if we go back we see that you know recruitment, selection, training and development is something which you know are greatly benefited through job specification. While remuneration, performance appraisal, job evaluation is something which is benefited or through a job description or it can be better done through a job description.

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Now, if you go little more and explain sales job description more, the sales job description is an outcome of the data collected during you know the job analysis. It deals with the content of the job. What does what does the sales job position do; how is it done; under what conditions is it done? So, it describes the duties responsibilities as well as the task and activities required to perform the job. Its relationship to other a jobs; it inter depends to other jobs, the reporting relationships, the nature of the working environment the health hazards if any.

So, this is something which a sales job description would define. Health hazards in the case of sales job could be the sales person working in extreme climatic conditions or the sales person being made to stay and board and lodge in very adverse environments which could lead to health problems. Also they could relate to travel and as me you know in areas where which are inaccessible by transport. So, this all of this is something which is clearly demarcated in the sales job description.

More specifically, it would also specify the types of products to be sold by the sales person, the customer segment he has to catered to the reporting structure, the frequency of making sales calls, the location and geographic area that he must catered to amount of travel you will have to do etcetera. So, it would specify the types of products to be sold, customer segments to be catered to reporting structure, frequency of making sales calls, location and geographic area and the amount of travel.

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And so, it would help in the grading and classification of jobs explaining the reporting relationships, developing performance measures and placement of employees in terms of initial placement or promotions and transfers. Now again, here this would be vital when we again a you know when decisions with respect to manpower planning recruitment and selection have to be taken.

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The other outcome of the sales job analysis is sales job specification which is a statement of minimum skills qualifications required to do a job. Also the physical characteristics and other abilities experience required to perform a job have to be is are stated. The personal attributes you know of which we mentioned here you know the personal characteristics may further be categorised as essential or desirable or contra indicators.

Essential are those you know which are extremely important and must be present for a perfect person to perform well on the job. They pertain to the knowledge skills and abilities or the KSA, desirable are those which if present would help perform the job better and contra indicators are those which if present would hamper the performance. So, this should not be present at all. So, we would not like a salesperson who have certain kinds of physical characteristics or skills and that is what are which will hamper his performance. So, that that is how we define as contra indicators.

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So, what are the sales job specification help us? It again helps us in manpower planning, recruitment, selection, training development, performance appraisal, job evaluation. As I mentioned because of the knowledge skills expertise a people may you know be promoted and either or may be transferred to other departments you know. So, in a way either an upward movement or a lateral movement which would ensure career planning for the employees is again something which is take away from sales job specification or something which would be benefited if a sales job specification is done.
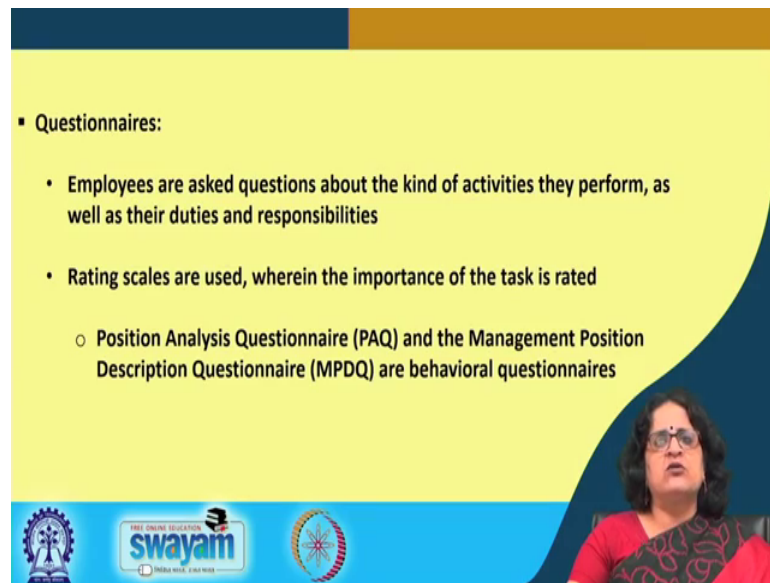
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So, how what is the process of a sales job analysis? You identify the sales job to be analysed you gather information with respect to the sale job. Now information here would be what type of data, what type of information to be collected, methods to be used, who would collect the data information about the job can be collected through the use of questionnaires, they can you know conducting interviews and through direct observation.

So, once a sales job you know which is to be you know studied or analysed, is identified, the next step is to gather information about the sales job. So, information it is important that decisions are taken with respect to what kind of information is to be collected; who will collect the information; what are the methods that are going to be used and methods here could either be based you know questionnaires or could be through interviews or through direct observation.

Interviews again could be individual or group interviews, questionnaires is you know are used which are generally rating scales and we there are very to very popular scale you know questionnaires which are used for a job analysis which is a position analysis questionnaire and the management position description questionnaire.

So, it should be very very clearly specified as to who would be doing this exercise; who would participate in the process; whether it is going to be the sales people or the sales managers or whether it is going to be the HR managers or it is going to be you know outsourced to third party and to consultants. Once information is gathered it is processed and a job description and job specification is prepared.

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Now, a little more on the questionnaires when data is collected or information about a sales job is gathered through questionnaires, employees are asked questions about the kind of activities they perform as well as the duties and responsibilities. A rating scales are used a where in the importance of a task is rated and to scales which we use as I mentioned is the PAQ and the MPDQ. PAQ is the Position Analysis Questionnaire and the MPDQ is the Management Position Description Questionnaire. These are both behavioural measures.

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With this, we come to an end of this particular session. So, we have references and then, with this we come to an end of the second lecture on the fifth module of the course. I hope you found this lecture fruitful.

Thank you.