ninth edition

Selling

Building Partnerships

Stephen B. Castleberry
John F. Tanner, Jr.

SELLING

Building Partnerships

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McGraw Hill Education

SELLING: BUILDING PARTNERSHIPS, NINTH EDITION

This book is printed on acid-free paper.

1 2 3 4 5 6 7 8 9 0 QVS/QVS 1 0 9 8 7 6 5 4 3

ISBN 978–0–07–786100–1
MHID 0–07–786100–0

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Media Project Manager: *Prashanti Nadipalli*
Cover Designer: *Studio Mondage, St. Louis, MO*
Cover Image: *Ariel Skelley/Getty Images*
Typeface: *10/12 Sabon*
Compositor: *S4Carlisle Publishing Services*
Printer: *Quad/Graphics*

Library of Congress Cataloging-in-Publication Data

Castleberry, Stephen Bryon.
Selling : building partnerships / Stephen B. Castleberry, University of Minnesota Duluth, John F. Tanner, Jr., Baylor University. —Ninth Edition.
pages cm
ISBN 978-0-07-786100-1—ISBN 0-07-786100-0 1. Selling. I. Tanner, John F. II. Title.
HF5438.25.W2933 2013
658.85—dc23

2013008649

www.mhhe.com

To Norah Grace Pederson, the cutest granddaughter in the world! And to my Creator, Redeemer and Friend, without whom I would be nothing.

—Steve Castleberry

To Karen—you make all the hard work worthwhile.

—Jeff Tanner

PREFACE

If you just looked at copyright dates, you would realize that this book was originally published over 20 years ago, but, truthfully, the work has been going on much longer than that. We took some time to reflect on how the sales profession and this book have changed over the years, much of it driven by technology. For example, we used to have a chapter on sales letters and written proposals—you can still find remnants of that material if you look hard enough, but most of that is obsolete. Now, we spend time on selling by email, when the use of texting is appropriate, and the influence of social media. Still, we've remained faithful to the premises that caused us to write the first edition more than 20 years ago:

- We don't want to teach the history of selling—we want our students to know how it is done now and why.
- Partnering skills are critical skills for all businesspeople.
- Adaptive communication skills—probing, listening, and presentation—are important in all areas of life but especially for salespeople.
- Students need to practice these skills through role playing.
- Helping people make the right decisions is not only the most ethical sales strategy but also the most effective strategy for long-term success.

At the same time, we've recognized that several factors are changing the face of selling:

- Increased use of multichannel go-to-market strategies, including inside sales.
- Changing roles for both technology and salespeople.
- Rapid economic change and the impact of the recession.
- Changing trends in how organizations buy, specifically the increasing use of technology, self-service, and presale search.

As we've revised the text, faithful adopters will see that we've held to the principles that made this book unique when it was launched and kept it in a leadership position. While others may have tried to copy role playing, partnering, or technology, none have truly captured the essence that makes this book the leading text.

WHAT'S NEW IN THE NINTH EDITION

- **Original examples** written specifically for this book, provided by current sales programs and salespeople, many of whom took the class and used this book.
- New chapter-opening **profiles**—all chapters open with a real salesperson or sales manager's perspective on the chapter. Each profile is new and original to this edition, and we've also integrated the profiles into each chapter as a running example to increase this feature's functionality.
- All new **"Building Partnerships"**—boxed features that provide more detailed examples of chapter material and present chapter material in a slightly different light.
- New **"Sales Technology"**—boxed features in each chapter, many new to this edition, that illustrate how technology is used. The result is a much better understanding of what professionals are calling Sales 3.0 or Sales in the Cloud (cloud computing). You'll find many types of technology, including knowledge management technology, CRM technology, and even GPS technology used in routing sales calls.
- All new **"From the Buyer's Seat"**—this feature was introduced in the last edition, and the feedback was overwhelmingly positive. Buyers, though, are no more stationary than salespeople, so we've created all new features for this edition, integrating the best of the last edition into the text.
- **Feature questions**—embedded in the end-of-chapter material are discussion questions that direct students back to the profiles, "Building Partnerships," "From the Buyer's Seat," and "Sales Technology" features so these features are read and used more fully.
- New **Role Plays**—we've written a new set of role plays featuring Stubbs and NetSuite. Stubbs is a

barbecue product line, and you can use this if you want to use simple role plays that span both trade sales and sales to users (institutions, restaurants, and so on). NetSuite is a hosted CRM application, and its Web site has role-based demonstrations so that students can learn what the product does for different people in the sales organization. This set of role plays can be a bit more complicated, but it also helps students understand what CRM software does for sales teams. At the end of most chapters, you will find a role play using NetSuite. Each set (Stubbs and NetSuite) have 10 prospect scenarios (with two buyer information sheets each in the Instructor's Manual) at the end of the book. If you would like to sell something different, Bob Erffmeyer has collaborated with Hormel to create a set of role plays that are available at www.sellingbuilding-partnerships.com.

- New **minicases**—each chapter has a new or significantly revised minicase as well as favorite minicases to choose from.

IMPORTANT FEATURES OF SELLING: BUILDING PARTNERSHIPS

Customer loyalty, customer lifetime value, the Challenger Model—all are influencing the way sales is done and taught. We believe that the partnering approach continues to be the best overall way to learn how to sell, particularly in the broader context of undergraduate education. Several unique features place this book at the cutting edge of sales technology and partnering research:

1. A continued emphasis on the partnering process, with recognition that multiple sales models may be appropriate in a company's total go-to-market strategy. We focus on the partnering process as the highest level of selling because the other models of transaction—focus, problem solver, and relational partner—still need to be learned as a foundation to partnering, and the partnering process fits the value-driven sales models currently in use in the field.
2. A thorough description of the partnering and buying processes used by business firms and the changes occurring in these processes. A number of important trends affecting buyers, such as more rigorous online research and social media use, also affect sellers.
3. A discussion of methods of internal and external partnering so that the value chain delivers the right value, in recognition of the salesperson's role in relationship management and value creation. This emphasis also broadens the applicability of the course for students who may not be interested in a sales career.
4. An emphasis throughout the text on the need for salespeople to be flexible—to adapt their strategies to customer needs, buyer social styles, and relationship needs and strategies.
5. A complete discussion of how effective selling and career growth are achieved through planning and continual learning.
6. An emphasis on the growing need for salespeople in organizations to carry the voice of the customer to all parts of the organization and beyond to suppliers and facilitators. This role is reflected in new product development, supply chain management, and many other functions in a customer-centric organization.

These unique content emphases are presented in a highly readable format, supported by the following:

- **Ethics questions**—at least two questions at the end of each chapter relate the chapter material to ethics.
- **Four-color exhibits and photographs** to support the examples highlighted in the book. Students find this book to be easy to read and use.
- ***"Thinking It Through"***—these features embed discussion questions into the text itself; for this edition, we've also offered teaching suggestions to integrate this feature more fully. There are several of these features in each chapter.
- **Minicases**—two small cases are available at the end of each chapter. These are useful for in-class exercises or discussion or as homework. In this edition, you'll find one new or revised mini-case in each chapter, but if you can't find one from the eighth edition that you really like, check out www.sellingbuildingpartners.com to get a copy you can hand out.
- **Ethics icon**—because we've emphasized ethical partnering since the inception of this book, we highlight the integration of ethics by noting any ethics discussion with an icon in the margin. You'll find ethics discussed in every chapter.
- **Selling Yourself**—a feature at the end of each chapter that we introduced in the previous edition that relates the material in the chapter to the student's life *right now*. It's more than just the student's job search process, however. Selling Yourself helps students see the connections between chapter material and all aspects of their lives, such as how a student can sell an organization to new members, working with apartment managers to resolve issues, interacting with friends and family members, how to add value as a group member in a class team project, and so forth.
- **Key terms**—each key term defined in a chapter is listed at the end of the chapter, along with the page number on

which the term is discussed. Key terms reflect current usage of sales jargon in the field, as well as academic terms.

- **Glossary**—key terms are also defined in a glossary at the end of the book.

FOR FACULTY

Instructor's manuals are available with any text, but the quality often varies. Because we teach the course to undergraduates and graduates, as well as presenting and participating in sales seminars in industry, we believe that we have created an Instructor's Manual (available at the Online Learning Center, www.mhhe.com/castleberry9e) that can significantly assist the teacher. We've also asked instructors what they would like to see in a manual. Based on their feedback, we include suggested course outlines, chapter outlines, lecture suggestions, and answers to questions and cases. On that site, you'll also find the slides, which are integrated into our teaching notes.

- **Slides** are available in PowerPoint, but given feedback from users (and our own experience), we've simplified their presentation. They are easily adapted to your own needs, and you can add material as you see fit.
- We also include many of the **in-class exercises** we have developed over the years. These have been subjected to student critique, and we are confident you will find them useful. You will also find a number of **additional role play scenarios.**
- Students need to practice their selling skills in a selling environment, and they need to do it in a way that is helpful. **Small group practice exercises, including role playing,** complete with instructions for student evaluations, are provided in the Instructor's Manual. These sessions can be held as part of class but are also designed for out-of-class time for teachers who want to save class time for full-length role plays.
- The **Test Bank** has been carefully and completely rewritten. Questions are directly tied to the learning goals presented at the beginning of each chapter and the material covered in the questions and problems. In addition, key terms are covered in the test questions. Application questions are available so students can demonstrate their understanding of the key concepts by applying those selling principles.
- The **Web site,** www.sellingbuildingpartnerships.com, is your Web site. This Web site is a place for faculty to share materials, as well as a place where it is easy for us to quickly bring you up-to-date materials. Here you will find short slide decks (three to five slides) about current sales and sales management research that is template-free so you can integrate it into existing presentations as you see fit. You will also find new videos, presentation slide decks from other faculty and sales professionals, and other materials designed to support your teaching. Short cases from previous editions are also posted there if you would like to include these as essay questions on exams or in-class exercises. We hope you will also contribute to the site. Instructor materials are password-protected so students do not have access to them.
- **New chapters**—at www.sellingbuildingpartnerships.com you'll find several new chapters that students can access, such as Writing Proposals, Account Management, and others. We use these chapters ourselves in advanced selling classes, but you may find these necessary in your introductory sales course or in a sales management course. Students can access and download these chapters at no cost.

PARTNERING: FROM THE FIELD TO THE CLASSROOM

Faculty who use our book have reviewed it and offered suggestions, and we have taken their comments seriously. What is different is that sales executives and field salespeople who are locked in the daily struggle of adapting to the new realities of selling also reviewed *Selling: Building Partnerships.* They have told us what the field is like now, where it is going, and what students must do to be prepared for the challenges that will face them.

Students have also reviewed chapters. They are, after all, the ones who must learn from the book. We asked for their input prior to and during the revision process. And judging by their comments and suggestions, this book is effectively delivering the content. There are, however, several places where their comments have enabled us to clarify material and improve on its presentation.

As you can see in "About the Authors," we have spent considerable time in the field in a variety of sales positions. We continue to spend time in the field engaging in personal selling ourselves, as well as observing and serving professional salespeople. We believe the book has benefited greatly because of such a never-ending development process.

Acknowledgments

Staying current with the rapidly changing field of professional selling is a challenge. Our work has been blessed with the excellent support of reviewers, users, editors, salespeople, and students. Reviewers include the following:

Jill Attaway, Illinois State University
Robert Consenza, University of Mississippi
Karl Sooder, University of Central Florida
Carolyn Waits, Cincinnati State Technical and Community College
Vicki L. West, Texas State University

Readers will become familiar with many of the salespeople who contributed to the development of the ninth edition through various selling scenarios or profiles. But other salespeople, sales executives, buyers, and sales professors contributed in less obvious, but no less important, ways. For reviewing chapters, updating cases, providing material for selling scenarios, and other support, we'd like to thank the following:

Amber Fischer, Rehrig Pacific
Sally Cook, 3M
James Ellington, Tandy Brands
Angela Bertero, Liberty Mutual Insurance
Brett Georgulis, 3M
David Maebane, PepsiCo-FritoLay
Mike Buckland, NCR
Renee Miles, Johnson & Johnson
Evan Adonis, Dallas Cowboys
Carl Anderson, Powertex Group
Sean Anderson, Grainger
Matt Arneson, Buildings Xchange
Ronald N. Borrieci, COB Embry-Riddle Aeronautical University
Ken Bluedorn, Lake Superior Bottle Shop
Ashley Braine, Dell
Tracey Brill, Abbott Labs
Becky Burton, Automation Xchange
Heather Carr, Career Professionals
Caitlin Christoff, Process Technology Xchange
John E. Cicala, Texas A&M University
Sally Cook, 3M
Bruce Culbert, Pedowitz Group
Susan Denny, Cisco
Dr. Greg DiNovis, College of St. Catherine
Mike Donley, Opus Medical
Professor Susan Emens, Kent State University
Chris Evers, Swisher International
Danny Fernandez, KMBS

Gina Garuso, Meat Processing Xchange
Graham Gedmestad, Automation Xchange
Tom Gottschald, Team Goodyear Tire and Gemini Service Center
Amanda Gonzales, NetworkIP
Mary Gros, Teradata
Matt Haberle, Maximum Impact
Christina Harrod, Applied Medical Devices, Inc.
Dr. David Henard, North Carolina State University
Jim Keller, Teradata
Barbara Kellgren, Lutron Electronics
Michael Krause, Sales Sense Solutions, Inc.
Danielle Lord, U.S. Foodservice
Jeff Lynn, Hartford Insurance Group
Angie Main, Midwest Communications
Camille McConn, ACell Inc.
Dave Moore, ADP
Eddy Patterson, Stubb's Bar-B-Q
Terry Perrella, Sammy's United
Dr. Jim Prost, University of San Francisco
Neil Rackham, Huthwaite, Inc.
Jen Rennelt, Career Professionals
Dr. Rick Ridnour, Northern Illinois University
Leif Ringstad, Samsung Telecommunications
Mike Rocker, 3M
Spencer Ryan, Stryker
Kristen Scott, Oracle
Layne Skoyen, Process Technology Xchange
Professor Karl Sooder, University of Central Florida
Chad Stinchfield, Hospira
Dr. Jeff Strieter, State University of New York College–Brockport
Dan Termunde, Hilti
Dr. Brian Tietje, California Polytechnic State University
John Tanner, Concentra
Dr. Brian Vollmert, Northern Illinois University
Zac VonBank, University of Minnesota Duluth
Michael Wendinger, University of Minnesota Duluth
Kristy Wilke, Buildings Xchange

In addition to the support of these individuals, many companies also provided us with material. We'd like to express our sincere gratitude for their support.

The McGraw-Hill team, as is the usual, was wonderful to work with. Our greatest interaction during manuscript preparation was with Jean Smith, development editor, and we appreciate her quick response and dogged determination to make sure we turn out a great product. Melissa Leick, our production manager, is another important contributor to the physical product. Gabriela Gonzalez, editorial, rounds out the production triumvarate who makes sure that what you are holding in your hands meets the standards set so high in our previous editions. Sankha Basu, our brand manager, and Donielle Xu, our marketing manager, also make sure the product is excellent and then help us communicate that to the market. We really appreciate their efforts on our behalf.

Several people assisted in research and manuscript preparation, and we gratefully appreciate their help: Bryant Duong and W. T. Tanner. Students who made helpful comments and reviewed for us include Brooke Borgias, Anna Hoglund, and Zac VonBank. Many other students and teachers have made comments that have helped us strengthen the overall package. They deserve our thanks, as do others who prefer to remain anonymous.

—Steve Castleberry

—Jeff Tanner

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ABOUT THE AUTHORS

STEPHEN B. CASTLEBERRY

Dr. Castleberry received his PhD from the University of Alabama in 1983. He taught at the University of Georgia for six years and for three years was UARCO Professor of Sales and Marketing at Northern Illinois University. Currently he is a professor of marketing at the University of Minnesota Duluth. He has received seven awards for teaching excellence, including the highest recognition by the University of Minnesota system of its most distinguished scholar teachers. His commitment to teaching has resulted in a number of cases, as well as articles in the *Journal of Marketing Education, Business Case Journal,* and *Marketing Education Review,* that describe his teaching style and methods.

Dr. Castleberry's research has been published in many journals, including the *Journal of Personal Selling and Sales Management, Industrial Marketing Management, Journal of Business Ethics, Journal of Selling and Major Account Management, Journal of Business and Industrial Marketing, Journal of Business to Business Marketing, Journal of Marketing Management, Journal of Consumer Marketing, Journal of Business Research, Journal of the Academy of Marketing Science,* and *International Journal of Research in Marketing.* He has also presented his work at the National Conference in Sales Management, as well as other national and regional conferences. He is past marketing editor of the *Journal of Applied Business Research* and serves on several journal editorial boards. He has received research grants and support from entities such as the London Business School, Gillette, Quaker Oats, Kimberly Clark, Proctor & Gamble, Coca-Cola Foods Division, and the Alexander Group/JPSSM.

Dr. Castleberry appeared as an academic expert in eight segments of *The Sales Connection,* a 26-segment video production shown on national PBS TV stations. He also appeared as the special guest on several broadcasts of *Sales Talk,* a nationally broadcast call-in talk show on the Business Radio Network.

Dr. Castleberry has held various sales assignments with Burroughs Corporation (now Unisys), Nabisco, and G.C. Murphy's and has worked as a consultant and sales trainer for numerous firms and groups. His interests outside academic life include outdoor activities (canoeing, hiking, bicycling, snowshoeing, skiing, and so on) and everything related to living on his 100-acre farm in northern Wisconsin. He is an elder in his church and a volunteer firefighter and first responder in the small township he lives in. He and his wife currently own and operate a publishing company, marketing and distributing popular press books internationally.

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JOHN F. TANNER, JR.

Dr. Tanner is Professor of Marketing, Baylor University. He earned his PhD from the University of Georgia. Prior to entering academia, Dr. Tanner spent eight years in industry with Rockwell International and Xerox Corporation as both salesperson and marketing manager.

Dr. Tanner has received several awards for teaching effectiveness and research. His sales teaching efforts have been recognized by student organizations, *Sales & Marketing Management,* and the *Dallas Morning News.* Dr. Tanner has authored or coauthored 13 books, including *Business Marketing: Connecting Strategy, Relationships, and Learning* with Bob Dwyer, and *The Hard Truth about Soft Selling* with George Dudley. His 14th book, *Dynamic Customer Strategy: Big Profits from Big Data*, is due out in the summer of 2013.

Research grants from the Center for Exhibition Industry Research, the Institute for the Study of Business Markets, the University Research Council, the Texas Department of

Health, and others have supported his research efforts. Dr. Tanner has published over 70 articles in the *Journal of Marketing, Journal of Business Research, Journal of Personal Selling and Sales Management,* international journals, and others. He serves on the review boards of several journals, including *Marketing Education Review, Journal of Personal Selling and Sales Management,* and *Industrial Marketing Management.*

Dr. Tanner writes a weekly blog, TannerismsonTuesday, about sales and sales management topics. He has been a featured presenter at executive workshops and conferences for organizations such as the Marketing Science Institute and the American Marketing Association. Since 2006 he has taught executive and graduate programs in India, Australia, Trinidad, Colombia, Canada, France, the United Kingdom, and Mexico, primarily as part of the CRM at the Speed of Light executive certification program. Jeff and his wife also breed and race thoroughbred horses on their farm.

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Walkthrough

Selling: Building Partnerships remains the most innovative textbook in the Selling course area today with its unique role plays and partnering skills which are critical skills for all business people. The authors emphasize throughout the text the need for salespeople to be flexible–to adapt their strategies to customer needs, buyer social styles, and relationship needs and strategies. This is followed by a complete discussion of how effective selling and career growth are achieved through planning and continual learning. The 9th edition has been updated to continue its relevance in the Selling market today just as it was twenty years ago.

The **chapter opening profiles** in this edition are the product of strong selling partnerships. Faculty from around the country introduced Steve Castleberry and Jeff Tanner to their former students who had gone on to careers in sales. The results are exciting new profiles from sales professionals who were students with an earlier edition and understand the philosophy of this book. The profiles are also integrated into the chapter with additional examples involving the profiled salesperson and end-of-chapter questions. Students can easily relate to these young professionals who have benefited from wonderful faculty and *Selling: Building Partnerships.*

PROFILE

"It is important that my referral partners know what a good prospect looks like to me so that the leads they send me are actually qualified referrals."

Angela Bertero

PROFILE My name is Angela Bertero, and I graduated from Texas State University–San Marcos in 2008. I earned my master's in business administration and bachelor of business administration in marketing. While at Texas State University, I served as president of our national championship Students in Free Enterprise team and won quarter finalist at the National Collegiate Sales Competition, both of which were advised by Vicki West. Mrs. West introduced me to Liberty Mutual Insurance, which is where I was hired as a licensed sales representative.

Liberty Mutual offers a full line of high-quality insurance products and services. As the main contact for the company, it is my responsibility to develop and maintain client relationships as well as identify prospective customers and promote Liberty Mutual products.

While retention is key to a business's success, prospecting for new clients is crucial to growing my book of business. I have found success using the following methods of prospecting: referrals from satisfied clients and business partners, networking, and cross-selling to current clients. Referrals are by far the most important source of prospects.

Successful prospecting isn't about running around town and meeting everyone you can. It's about identifying your target market and knowing how to communicate that to your existing customers and referral partners. To do this, I often review the services I have provided for my clients and ask them if they know anyone in a similar situation that I may be able to help. I tell all of my clients that the greatest compliment I can receive is a referral from them.

I also work closely with a variety of referral partners to fill my pipeline with prospective new clients: mortgage brokers, realtors, financial advisors, auto dealerships, bankers, employers, school districts, and alumni associations, to name a few.

It is important that my referral partners know what a good prospect looks like to me so that the leads they send me are actually qualified referrals.

My networking group, Business Networking International (BNI), has given me the opportunity to give weekly educational moments to other professionals in different industries, or, as I like to call them, my marketing team. When I first joined BNI, I expected—or hoped for—immediate results. I have since learned that building personal relationships while becoming a trusted advisor to those around me is critical to building my network over time. After just a year, though, the partnerships I have made are a huge part of my weekly prospecting. We meet once a week to share ideas, help grow each other's businesses, and fill each other's pipelines with prospects. Then, we meet one to one to learn more about how we can work together for a mutually beneficial partnership.

To be a successful networker, make an effort to understand other people's businesses and connect with them on a personal level. Always follow up and thank your networking contact for the leads they send you and, if you can, send them leads as well.

Visit our Web site at: www.libertymutual.com

Professional sales **ethics** have always been the hallmark of this text, and the new edition integrates ethics throughout each chapter, as well as in discussion questions devoted to this topic. Each chapter has separate ethics discussion questions, some of which were suggested by former students' experiences or current events.

ETHICS PROBLEMS

1. Suppose you're working at a trade show. You walk the floor of the show during one of your breaks, and you strike up a conversation with a sales rep from a competitor. She starts talking about their products and gives details on price breaks she offers to banks. She asks, "What kind of price deals do you give banks?" What would you say?
2. Suppose a spotter not only tells you about a potential prospect but also provides you with confidential memos and e-mails, detailing the people involved and what the issues are. However, all the e-mails and notes are marked with statements that prohibit the information from being shared with anyone outside of the company. What will you do with that confidential information that you're not supposed to have?

Current and continued emphasis on selling examples from China, India, Europe, and all around the globe reflects the reality of the global nature of selling.

This American salesperson needs to recognize the differences between communicating in an Arab culture and an American culture.

- Make a link to things you think prospects would find interesting, like articles and Web sites. Tweets should have real value to the receiver.
- Don't create spam with Twitter.
- You can schedule when the tweets will be sent with add-ons like Social Oomph.
- Share interesting things about your community and nonbusiness items to help make yourself real. Remember that you are trying to create a friendly relationship.
- Remember to listen, not just send out tweets. Respond to at least some of the replying tweets. Don't feel guilty if you don't read or respond to all tweets.

Because of the growing use of social networking, Chapters 6 and 7 will discuss ways to use these tools to prospect and learn more about new customers.

ADJUSTING FOR CULTURAL DIFFERENCES

Communication in international selling often takes place in English because English is likely to be the only language salespeople and customers have in common. To communicate effectively with customers whose native language is not English, salespeople need to be careful about the words and expressions they use. People who use English in international selling should observe the following rules:

- Use common English words that a customer would learn during the first two years of studying the language. For example, use *expense* rather than *expenditure* or *stop* instead of *cease*.
- Use words that do not have multiple meanings. For example, *right* has many meanings, whereas *accurate* is more specific. When you use words that have several meanings, recognize that nonnative speakers will usually use the most common meaning to interpret what you are saying.

Many technologies, including the sales cloud (or Sales 3.0 technology), pad computers, GPS, the Internet, and CRM software, have changed how salespeople operate. The ninth edition includes all new illustrations with its feature **"Sales Technology,"** which discusses how selling and technology interact within the context of each chapter.

SALES Technology 6.1

GENERATING LEADS THROUGH SOCIAL MEDIA

With the enormous presence that social media has in today's society, it is important for salespeople to consider their use. Here are a few quick yet astonishing facts about social media:

- Facebook has more weekly traffic than Google.
- If Facebook were a country, it would be the third largest in the world.
- The Ford Explorer launch on Facebook generated more traffic than a Super Bowl ad.
- There are more than 465 million Twitter accounts with 1 million more being added each day and 175 million tweets being tweeted daily.
- LinkedIn has two new members joining every second.
- There are over 57 million LinkedIn users in the United States alone.

When used correctly, social media has the potential to be an integral part of an organizations prospecting strategies.

"Thinking It Through" boxes (at least two per chapter) are engaging exercises that can inspire classroom dialogue or serve as a short-essay exam question to help students experience concepts as they read.

thinking **it** through

Who is a center of influence for you right now? How could a salesperson who wanted to sell you something learn who your center of influence is?

"From the Buyer's Seat" is an all-new original feature that provides students with a buyer's inside perspective. "**Building Partnerships"** boxes examine how successful salespeople build relationships. All are original to the book—many using examples provided by former students and other sales professionals. And all are discussed as part of the end-of-chapter questions so that you can fully integrate them into the class.

From the BUYER'S SEAT 4.1

PLEASE LEARN HOW TO COMMUNICATE!

As a senior buyer at Microsoft, I see many different types of salespeople. I receive numerous calls each day from salespeople trying to make appointments with me and there are usually one of two outcomes:

A. The salesperson that has done their research about my company prior to the call and has a very concise and clear message tends to have the best chance of actually getting the appointment that they are shooting for.

B. Often salespeople will say, "I didn't expect you to answer your phone!" The salespeople who have this response are caught completely off guard and stand very little chance of obtaining their desired appointment.

- Using active listening skills during a conversation with me and then remembering specifics from that conversation in future meetings. This proves to me that they really listen to what the objectives were, have retained this information, and then have acted on it to prepare for the next meeting.
- A salesperson who knows what situations are better to be handled via the telephone as opposed to e-mail. Under certain circumstances, sending an e-mail instead of making a phone call can make the problem worse, so knowing the proper means of communication can definitely help a salesperson build a relationship with me.

BUILDING Partnerships 5.1

CUSTOMIZE THE PRESENTATION

At ADP, we consider ourselves business consultants. We don't have a prescript sales pitch that is used on every call. The goal is to educate the owner on varying topics surrounding payroll to show them how a service like ADP can make them more efficient and compliant with state and federal employer laws. Because I meet with business owners who have anywhere from one employee to 49 employees in every industry thinkable, the needs of the businesses are never the same.

I have to customize my presentation depending on many factors. For example, a first-time restaurant owner who has 35 tipped employees will need me to explain everything we do in depth, from payroll taxes and new hire reporting to FICA tip reporting. Most new business owners are not aware of all their tax liabilities and ways they can get money back from the government for having tipped employees. The owners are very appreciative that I take the time to explain all these fiduciary responsibilities and the fines they could be liable for.

On the other hand, when I meet with a longtime owner of a nonprofit company with three employees, this presentation is completely different. In this situation, the owner wouldn't be interested in hearing about the "Payroll 101" I was telling the new business owner. Instead, he or she would want to know about payroll being directly tied to grant funding, ability to offer comprehensive benefits, and wage tracking for grant reporting.

Either way, I am selling the same service but simply customizing the presentation to the buyers' needs.

Source: Meggie Dominguez, personal correspondence, used with permission.

case 9.2

Miller Lite

On December 5, 1933, the U.S. Congress passed a bill that would repeal the Eighteenth Amendment and thus would end prohibition in this country. The implementation of prohibition had been linked to many negative social issues, such as organized crime, bootlegging, and racketeering. Some historians have commented that the alcohol industry accepted stronger regulation of alcohol in the decades after repeal as a way to reduce the chance that Prohibition would return.

Today, the American beer industry is the most heavily regulated industry in the country, even more than the tobacco industry, and Minnesota is a leader when it comes to heavy regulation and high taxes. For example, here are the beer laws in Minnesota:

1. All retailers must be offered the same price at all times.
2. Beer distributors cannot pay for any cooperative advertising.
3. Beer distributors cannot give any product for free.
4. Beer distributors have a maximum of $300 per brand, per year, to promote the brand within the account (using things like neon lights and point-of-sale items), but this can't be in the form of price cuts for an individual retailer.

I was the sales representative for a beer distributor in Minnesota. My territory volume was trending down, and I was told by my manager that I needed to secure incremental activity to promote Miller Lite. My largest customer, Bill, at Save-a-Lot Liquor, gave me an opportunity for an additional holiday ad in his weekly flyer. I knew this ad would yield a 200 percent lift in sales for the week and in turn would pay a nice commission to me.

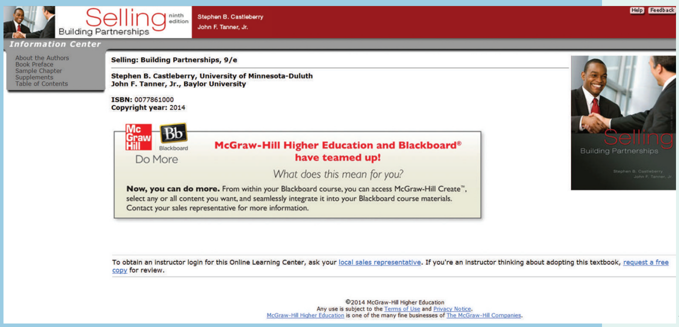
Class-tested **minicases** at the end of each chapter work well as daily assignments and as frameworks for lectures, discussion, or small group practice. Each chapter includes at least one new minicase. The cases encourage students to apply theories and skills learned in the text to solve sales situations.

ROLE PLAY CASE

As a NetSuite salesperson, how can youhelp your buyer prospect better? Think about how NetSuite might be able to help your buyer develop a comprehensive prospecting system, from lead generation to making the first appointment. One way that NetSuite can help is to automate direct mail. Using the database that salespeople create, the marketing department can send mail to every contact who meets certain criteria. For example, it can select an industry and send a letter only to prospects in that industry. Similarly, NetSuite provides reporting capabilities. Salespeople can see how effective they are at each method of prospecting and

Students can practice their partnering skills in brand new **role play exercises** that encourage personal growth and experiential learning. Each role play features NetSuite, the software used in national collegiate sales competition. Also, comprehensive role plays are available at the end of the book, with additional role plays included in the Instructor's Manual.

Supplements



The **Online Learning Center** mhhe.com/castleberry9e houses the Instructor's Manual, PowerPoint slides, test bank, and a link to McGraw-Hill's course management system, PageOut for the Instructor. It also includes study outlines, quizzes, key terms, career information, video clips, and online resources for the student.

CONTENTS IN BRIEF

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CONTENTS

chapter 1

SELLING AND SALESPEOPLE

SOME QUESTIONS ANSWERED IN THIS CHAPTER ARE

- What is selling?
- Why should you learn about selling even if you do not plan to be a salesperson?
- What is the role of personal selling in a firm?
- What are the different types of salespeople?
- What are the rewards of a selling career?

PROFILE

"Your customers, whether they are internal, end users or distributors, are relying on you to help them get their job done."

Amber Fischer, Rehrig Pacific

PROFILE My name is Amber Fischer, and I am a 2004 graduate of the St. Catherine University (formerly known at College of St. Catherine) business-to-business sales program. I began my college career as a sociology major. I was fascinated by observing what factors influence people's decisions and behaviors as they relate to their surroundings and teachings. As I approached my junior year, it became evident that a career in the field of business was the right path for me. Lynn Schleeter, Marge Matheson-Hance, Mary Henderson, and Greg Dinovis did a great job of showing me that the sales program was a perfect fit, as it combined my love of understanding and interacting with people with my appreciation for commerce. I was fortunate enough to be selected at 3M Frontline sales intern for the summer of 2003. Throughout that summer and the subsequent school year, I was responsible for working with 3M sales reps throughout the organization and in a variety of industries to build customer-focused organization "maps" in an effort to increase sales through cross selling. In order to be successful, I needed to sell the 3M reps on giving me the time and exposure to Fortune 500 customers so that I could construct accurate maps that I would then present to a large number of reps. I then needed to sell them on using my maps to get in deeper with their customers and share their contacts with other 3Mers.

Over my postcollege career, I have been fortunate enough to work in sales in a variety of capacities. I have worked for a nationwide distributor, Interline Brands, to sell directly to end users. In this role, I had to learn to sell my ability to solve urgent customer problems as well as sell my capabilities to manufacturer reps so that they would entrust me with the best training and leads in order to grow my business. I was also fortunate enough to work for 3M as a manufacturer's rep. In this role, I sold through distributor reps to end users. Distributors sell a variety of lines, so I had to sell them on the reasons why they should focus on my products and promote them to the end user. I also needed to influence end users to request 3M products.

I currently work for Rehrig Pacific selling transport packaging to large retail and food and beverage customers (Walmart, Pepsi, and Target are a few key customers). In this role, I am responsible for influencing and directly selling our products to the end user. I must also sell internally, as I work directly with production to get my product manufactured and delivered quickly. We also have a great design team that I can work with to bring innovative solutions to our customers. Of course, I must sell my business case plan to our executives in order to get a design budget.

While I have had a variety of sales experiences in my career, there are some significant consistencies I can identify. Your customers, whether they are internal, end users, or distributors, are relying on you to help them get their job done. Understanding the business pressures that result in needs is vital to effectively communicating your value to the customer. This does not happen overnight. You must put in the time and hard work to really understand your customers. You must be reactive in responding to their needs, proactive in bringing creative ideas to their challenges, and consistent in your message that you are the person they should be relying on to meet their goals.

Visit our Web site at:
rehrigpacific.com

WHY LEARN ABOUT PERSONAL SELLING?

What's the first thing that pops into your mind when you hear the phrase "personal selling"? Do you conjure up images of fast-talking, nonlistening, pushy guys who won't take no for an answer? How about this definition: "Personal selling is the craft of persuading people to buy what they do not want and do not need for more than it is worth.[1]"

If that is your view of selling, we encourage you to study this book carefully. You're going to learn things about selling that you never knew before. Let's start with a more accurate definition of a professional salesperson, which is quite different from the one just mentioned. **Personal selling** is "the phenomenon of human-driven interaction between and within individuals/organizations in order to bring about economic exchange within a value-creation context."[2] Let's look at the definition more closely:

- It is more than just a set of sequential steps that a salesperson goes through with each buyer in order to get the order. It's not just about what a seller does but rather the *interaction* between sellers and buyers that makes selling work today. We will talk about steps in the selling process in this book, but remember that they are not necessarily sequential or all needed for all buying situations.
- It can often involve multiple people and organizations (not just one seller and one buyer, for example).
- Selling is all about creating **value**, which is the total benefit that the seller's products and services provide to the buyer. When describing this to prospects, the seller often refers to the collection of buyer-specific benefits as the **customer value proposition** (CVP), described more fully in Chapter 9. Just as our definition implies, this CVP is dynamic, evolving as time goes on and depends on the context of the situation.[3] In fact, success in future business often depends on enhancements to the original CVP.[4] Exhibit 1.1 provides examples of ways that salespeople create value.
- The goal of selling is to create economic exchange, not merely to promote the product or service. Customers today are very technology savvy and search enabled and no longer rely on salespeople alone to learn about products and services. Selling recognizes this fact and provides needed services to create the exchange that is in the best interests of both parties.

Exhibit 1.1
Examples of Ways That Salespeople Can Add Value in a Selling Situation

Provide an interface between the buying and selling companies.

Identify networks of key players in both the buying and the selling companies and then help to activate them to the task of cocreating value.

Encourage two-way communication and help to create effective bonds between people.

Help to create a climate of coleadership in the meetings rather than having the seller always take the leadership role.

Encourage both sides to learn from and understand each other.

Facilitate truly useful meetings and conversations between all parties.

Help to manage any situations that arise to bring everyone back to a value-adding perspective.

Help to foster conditions of trust and commitment between parties.

Be attuned to activities that increase value adding and help facilitate more of them.

Help key players to understand their own perceptions of what value is to them.

Create meaning out of situations that arise and conversations that occur.

Help to provide closure on solutions that provide value to all parties.

Source: Adapted from information found in Alexander Haas, Ivan Snehota, and Daniela Corsaro, "Creating Value in Business Relationships: The Role of Sales," *Industrial Marketing Management* 41, no. 1 (2012), pp. 94–105.

This economic exchange involves what we call profit for both parties. Everyone knows that sellers sell to make a profit. Why do buyers buy? Typically a student will say, "To satisfy a need or a want," and that is a good basic answer. More helpful is to recognize that buyers also buy to make a profit. But they calculate profit differently. A seller's profit is selling price minus cost of goods sold and selling costs. A buyer's profit, or value, is the benefit received minus the selling price and costs and hassles of buying, or time and effort, as noted in this equation:

$$\text{Personal Value Equation} = \text{Benefits received} - (\text{Selling price} + \text{Time and effort to purchase})$$

For example, when someone buys a product from a salesperson, the buyer's profit may be higher than that obtained by buying on the Internet due to the benefits received (expert knowledge in determining the appropriate product to purchase, assistance with installation, resolution of concerns, creation of new offerings based on the buyer's specific needs, and so forth). We'll explain more about benefits in Chapter 8.

EVERYONE SELLS

This text focuses on personal selling as a business activity undertaken by salespeople. But keep in mind that the principles of selling are useful to everyone, not just people with the title of salesperson. Developing mutually beneficial, long-term relationships is vital to all of us. In fact, the author team has taught the principles in this book to many groups of nonsalespeople. Let's look at some examples of how nonsalespeople sell ideas.

As a college student, you might use selling techniques when you ask a professor to let you enroll in a course that is closed out. When you near graduation, you will certainly confront a very important sales job: selling yourself to an employer.

To get a job after graduation, you will go through the same steps used in the sales process (discussed in Part 2, Chapters 6 through 14). First you will identify some potential employers (customers). On the basis of an analysis of each employer's needs, you will develop a presentation (as well as answers to questions you might encounter) to demonstrate your ability to satisfy those needs. You might even create a video resume, as Sales Technology 1.1 describes. During the interview you will listen to what the recruiter says, ask and answer questions, and perhaps alter your presentation based on the new information you receive during the interview. At some point you might negotiate with the employer over starting salary or other issues. Eventually you will try to secure a commitment from the employer to hire you. This process is selling at a very personal level. Chapter 17 reviews the steps you need to undertake to get a sales job.

Nonsalespeople in business use selling principles all the time. Engineers convince managers to support their R&D projects, industrial relations executives use selling approaches when negotiating with unions, and aspiring management trainees sell themselves to associates, superiors, and subordinates to get raises and promotions.

It's not just businesspeople who practice the art of selling. Presidents encourage politicians in Congress to support certain programs, charities solicit contributions and volunteers to run organizations, scientists try to convince foundations and government agencies to fund research, and doctors try to get their patients to adopt more healthful lifestyles. People skilled at selling value, influencing others, and developing long-term relationships are usually leaders in our society.

SALES Technology 1.1

VIDEO RESUMES—THE NEW WAY TO SET YOURSELF APART

Employers receive hundreds of resumes for each sales position. You may meet all of the qualifications for the job and be a great candidate, but when it comes down to it, the people who review resumes and decide who will even get a call for an interview do not have the time to read through every aspect of each individual resume. You need to set yourself apart from the rest of the competition

With a video resume, you have the chance to instill your face in their minds. And why take the risk of having your resume read a way in which you did not intend for it to be read when you can verbally tell them your qualifications and why you are a great fit for the position; this limits the chance of communication errors. Here are some tips:

Do's of Video Resumes

- Practice and prepare what you are going to say.
- Dress professionally as if you were going in for an interview.
- Envision the camera as the eyes of the person viewing your video and maintain eye contact.
- Smile, smile, smile—your nonverbal cues can send a stronger message than you think.
- Ensure that the lighting in the room is as best as possible—dim lighting can lead to poor quality and also shows lack of preparedness.
- Edit your video, this is your opportunity to make it perfect. If you're not skilled with editing, check your campus for services that may be able to help you out.
- Keep the area that is being taped to no more than a head to waist shot.
- Film against a solid color—this will help to reduce "noise."
- Make sure that you are in a quiet area and free of distractions.

Don't of Video Resumes

- Get ahead of yourself and begin speaking too fast—you are talking to your computer, you have nothing to be nervous about.
- Chew gum—again, try to treat this entire process as if you are going in to the hiring manager's office for an interview.
- Avoid filler words, such as "umm," "ahh," "like," and "you know"—these words are a waste of time and show nervousness and lack of preparation, and if "they know," why would you have to tell them?

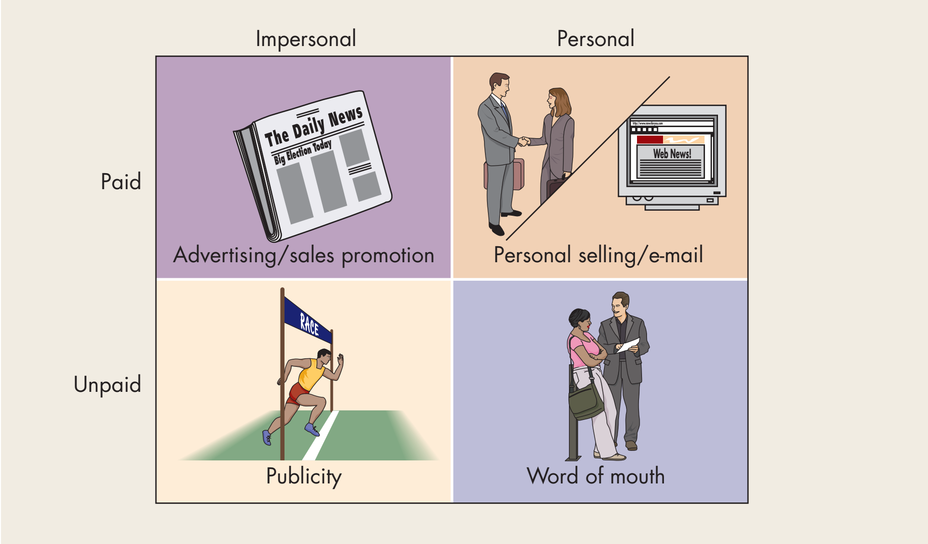
Source: Personal experience plus "Do's and Don'ts," *Internships.com*, http://www.internships.com/student/resources/prep/videointro/tips, August 30, 2012.

CREATING VALUE: THE ROLE OF SALESPEOPLE IN A BUSINESS

Companies exist only when their products and services are sold. It takes skill for salespeople to uncover exactly what a customer is looking for and how a potential product or service could add such value. Because this is so critical, this topic is covered in great detail in many chapters in this book.

Companies have many options in how they can approach customers as they add value, and the various methods are sometimes called **go-to-market strategies.** Strategies include selling through the Internet, field sales representatives, business partners, resellers, manufacturer agents, franchises, telemarketers, and others. Selling firms determine which strategy to use for each customer based on such factors as the estimated value of the customer over the lifetime of the relationship, often called **customer lifetime value.**[5] (Because this concept is so important, it is more fully discussed in Chapter 14.) Organizations whose go-to-market strategies rely heavily on salespeople are called **sales force–intensive organizations.**

Exhibit 1.2
Communication Methods



Naturally some firms use several strategies at the same time, and this is called **multichannel strategy.**[6] For example, Motorola uses the Internet for very small customers, telemarketers for midsized customers, and a field sales force for large, important customers.

Another way to view the role of salespeople in business is to realize that they are one element in the company's marketing communications program, as Exhibit 1.2 indicates.[7] Advertising uses impersonal mass media such as newspapers and TV to give information to customers, while sales promotions offer incentives to customers to purchase products during a specific period. Salespeople provide paid personal communication to customers, whereas publicity is communication through significant unpaid presentations about the firm (usually a news story). Finally, communication also occurs at no cost through word of mouth (communication among buyers about the selling firm).

Each of the communication methods in Exhibit 1.2 has strengths and weaknesses. For example, firms have more control when using paid versus unpaid methods. However, because publicity and word of mouth are communicated by independent sources, their information is usually perceived as more credible than information from paid communication sources. When using advertising, Internet sites, and sales promotions, companies can determine the message's exact content and the time of its delivery. They have less control over the communication delivered by salespeople and have very little control over the content or timing of publicity and word-of-mouth communication. Personal selling comes out on top in flexibility because salespeople can talk with each customer, discover the customer's specific needs, and develop unique presentations for that customer. Not surprisingly, personal selling is the most costly method of communication. The average cost of a sales call can be 10,000 times more expensive than exposing that single customer to a newspaper, radio, or TV ad.

Because each communication vehicle in Exhibit 1.2 has strengths and weaknesses, firms often use **integrated marketing communications,** which are communication programs that coordinate the use of various vehicles to maximize the total impact of the programs on customers.

For example, when Stouffer's introduced its new Spa Cuisine Classics, dinners that were inspired by chefs from wellness spas across the country, it used integrated marketing communications. Salespeople called on supermarkets and wholesale clubs. Advertising was created to generate awareness in consumers' minds. Coupons were offered to consumers to create interest and spur more rapid sales. Taste tests in stores were offered to build excitement and word of mouth. Publicity was generated that focused on the dinners' balance of great taste combined with the nutrition of whole grains. Although using salespeople in this example was an expensive part of the communication mix, it was important to do so to ensure that customers' precise needs were met.

Many students think—incorrectly—that advertising is the most important part of a firm's promotion program. However, many industrial companies place far more emphasis on personal selling than on advertising. Even in consumer product firms such as Procter & Gamble, which spends more than billions annually on advertising, personal selling plays a critical role.[8]

Students sometimes also have the mistaken notion that the growing world of e-commerce and the Web as a source of information are causing the demise of salespeople. While the Web has drastically changed the life of a salesperson, salespeople are not being completely replaced by all of the new technology. However, it is critical that the salesperson actually add value in this new reality.

Let's look at this from another perspective—your own life. Have you purchased anything from the Internet? Probably every student has—travel, music, clothing, books, and more. Have you noticed that, other than Internet services, everything you purchased on the Web existed in some form before the Web? Why, then, has the Web become such a ubiquitous place for commerce? Simple. The Internet makes information as well as products and services available the way the consumer wants them. Those who sell via the Web gain competitive advantage by selling the way the buyers (or at least some buyers in some situations) want to buy.

If salespeople want to sell effectively, they have to recognize that the buyer has needs that are met not only by the product but also by the selling process itself. These needs include time savings, shopping costs such as gas if they drive around, and others. Part of the salesperson's responsibility is to sell the way the buyer wants to buy.

WHAT DO SALESPEOPLE DO?

The activities of salespeople depend on the type of selling job they choose. The responsibilities of salespeople selling financial services for General Electric differ greatly from those of salespeople selling pharmaceuticals for Merck or paper products for Georgia-Pacific. Salespeople often have multiple roles to play, including client relationship manager, account team manager, vendor and channel manager, and information provider for their firms.[9] Studies have shown that when a salesperson's role encompasses more than simply the selling function, the seller's firm has more overall value.[10]

Sales reps help with installations to ensure proper use.

CLIENT RELATIONSHIP MANAGER

Sales jobs involve prospecting for new customers, making sales presentations, demonstrating products, negotiating price and delivery terms, writing orders, and increasing sales to existing customers. But these sales-generating activities (discussed in Chapters 6 through 14) are only part of the job. Although the numbers would vary greatly depending on the type of sales job, salespeople generally spend less than 50 percent of their time on-site in face-to-face meetings with customers and prospects. The rest of salespeople's time is spent in meetings, working with support people in their companies (internal selling), traveling, waiting for a sales interview, doing paperwork, and servicing customers.

Rather than buying from the lowest-cost suppliers, many buyers now are building competitive advantages by developing and maintaining close, cooperative relationships with a select set of suppliers, and salespeople play a key role in these relationships. Salespeople help customers identify problems, offering information about potential solutions and providing after-sale service to ensure long-term satisfaction. The phrase often used to describe this is **customer-centric**, which means making the customer the center of everything the salesperson does.[11] And buyers are demanding **24/7 service** (which means they expect a selling firm to be available for them 24 hours a day, 7 days a week). When salespeople fail in maintaining these relationships, the results are catastrophic. Research indicates that buyers worldwide are deserting firms they used to do business with in record numbers when their expectations are not met. For example, two-thirds of consumers surveyed cited poor service as the reason they left a provider in the last 12 months.[12]

The salesperson's job does not end when the customer places an order. Sales representatives must make sure customers get the benefits they expect from the product. Thus, salespeople work with other company employees to ensure that deliveries are made on time, equipment is properly installed, operators are trained to use the equipment, and questions or complaints are resolved quickly. Progressive selling firms like Standard Register and Johnson & Johnson's Ortho-Clinical Diagnostics are beginning to implement **six sigma selling programs,** which are designed to reduce errors introduced by the selling system to practically zero. Chapter 14 provides more insights on developing ongoing relationships through customer service.

ACCOUNT TEAM MANAGER

Salespeople also coordinate the activities within their firms to solve customer problems.[13] Many sales situations call for team selling, and studies show that salespeople who attempt to go it alone (sometimes called being "lone wolves") perform poorly, have lower job satisfaction, and have higher turnover intentions.[14] An example of team selling occurred when Dick Holder, president of Reynolds Metal Company, spent five years "selling" Campbell Soup Company on using aluminum cans for its tomato juice products. He coordinated a team of graphic designers, marketing people, and engineers that educated and convinced Campbell to use a packaging material it had never used before. Approaches for improving efficiency by working closely with other functional units in the firm are fully discussed in Chapter 16.

SUPPLY CHAIN LOGISTICS AND CHANNEL MANAGER

Sometimes it is necessary to interact with other partners and vendors to meet a customer's needs, and salespeople are often the key managers of these many relationships. With regard to **supply chain logistics**, the management of the supply chain, if a customer buys a new jet from Boeing, with features that will be added by a third-party vendor, the salesperson will need to coordinate the efforts of the vendor with Boeing. Glenn Price, who sells life and disability insurance with Northwestern Mutual, realizes the importance of working with channel partners. "Today the financial services industry is very complex, as are the needs of my clients, and I can't be all things to all people. I can, however, create a team of specialists. For areas outside of my expertise, all I have to do is identify which