CONCEPTUALIZING SALESPERSON COMPETITIVE INTELLIGENCE: AN INDIVIDUAL-LEVEL PERSPECTIVE

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Academicians and practitioners alike have agreed on the significance of competitive intelligence in firm performance, strategy development, and the critical role of the sales force in gathering this intelligence. However, the influence that competitive intelligence has on individual salesperson performance has been widely neglected. In order to fill this gap in the literature, this research embarks on the theoretical development of competitive intelligence as an individual-level construct. The differentiating qualities of salesperson competitive intelligence and organizational competitive intelligence are described and a framework presenting the general process of salesperson competitive intelligence is proposed. Finally, links from salesperson competitive intelligence to performance are presented, and the potential negative implications of this intelligence are discussed.

In today's competitive business environment, organizations must adapt to their surroundings in order to survive and prosper. The speed and aggressiveness of competition has forced organizations to think beyond traditional approaches that focus on the construction of competitive advantage to advance new initiatives that lead to the demolition of a competitor's advantage (D'Aveni 1994; McNamara, Vaaler, and Devers 2003). One reaction as competition has increased and technology has evolved is that firms have become more market oriented. It can be argued that one outcome of this market orientation, which can be defined as the generation and dissemination of intelligence and responsiveness to that intelligence (Kohli and Jaworski 1990), has been what can be labeled *competitive intelligence* (hereafter, CI). As pointed out by Deshpande and Farley (1998), however, market orientation (MO) is not concerned with gathering CI, per se, but as organizations cast a wide net to capture useful information concerning the environments in which they operate, it is likely that part of what is gathered would be considered CI. However, sensing the advantages of CI, major multinational corporations, such as General Motors, Eastman Kodak, and British Petroleum, either have created formal CI units (Vedder et al. 1999) or have adapted existing processes for collecting and analyzing information on the external environment (Groom and David 2001). Thus, while we believe there to be some similarities between the CI and MO literature, our paper focuses on issues related to CI.

Over the years, a number of theoretical and empirical research studies have advanced conceptual models of CI and offered various perspectives on CI practices (e.g., Attaway 1998; Band 1982; Goodman 1971; Gordon 1989). Despite diversity in terms of approach and method, a common theme that emerges among previous studies is that employees play an important role in the CI process. In fact, Caudron (1994) suggested that up to 90 percent of the intelligence a company needs is possessed by its employees, who collect vast amounts of information as they interact with suppliers, customers, and other industry contacts. Among a firm's employees, the sales force is recognized as the single best internal source of information concerning markets, customers, and competitors (Hershey 1980; Lambert, Marmorstein, and Sharma 1990; Young 1989). This is, in large part, because salespeople operate as boundary spanners between the firm and the outside world. Thus, they have access to intelligence unavailable to many others in the firm (Rapp et al. 2006). This is especially true for intelligence relating to competitors because the salespeople's realm is contiguous to the competitors' domain.

However, while salespeople may play a critical role in the gathering of intelligence, it should also be noted that their being on the "front line" of the organization in terms of its relationship to the external environment requires that salespeople also have a great need for information concerning what is occurring in the environment. For example, if a customer indicates that a competitor is able and willing to provide a more advantageous delivery schedule for a product, the salesperson must be able to quickly determine the capabilities of his or her organization in order to counter. It is often the case that

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salespeople must make these determinations quickly without being able to consult with others in the organization. Thus, just as the organization must have CI concerning the broad markets in which it operates, the salespeople must also have and utilize CI concerning the specific customers, competitors, and contexts in which he or she operates.

The purpose of this paper is to develop the concept of salesperson competitive intelligence (hereafter, SCI). We define SCI as individual-level knowledge about competitors and the competitive environment that can be used tactically to aid in enhancing salesperson performance. We also argue that SCI has four qualities that can be used to further differentiate it from organizational competitive intelligence (hereafter, OCI) and will present those qualities and show how they are different across SCI and OCI. Finally, we discuss theoretical and managerial implications and directions for future research.

DEFINING ORGANIZATIONAL-LEVEL COMPETITIVE INTELLIGENCE

As we believe SCI to be an individual-level version of OCI, in order to properly define SCI, we need to first review how CI has been defined in the literature. Dishman, Fleisher, and Knip (2003) note that although the literature pertaining to the importance and value of competitor knowledge goes back more than 40 years, it was not until the 1970s that what we now know as the study of CI was developed. In fact, they point out that one could consider Porter's (1980) groundbreaking book on competitive strategy, which included the presentation of what has become known as the "five forces" model, as the first coherent discussion of CI in a business context. Regardless, there have been a number of definitions of and labels for CI, which yields a fragmented literature stream. In fact, it has been argued that "the field of CI and its management suffers from a variety of semantic and domain ambiguities that remain unresolved after several decades of research work" (Dishman, Fleisher, and Knip 2003, p. 16).

Webster (1965) focused on the issue of information regarding competitors' actions and proposed that competitors' information can affect not only a firm's competitive strategy but also its marketing mix elements. Webster argued that "any marketing decision that does not take competitors' behavior into account is likely to lead up to a blind alley" (1965, p. 81). Championing Webster's idea, Moss (1979) reported several case studies where highly diverse companies used competitors' information collected by their own salespeople to formulate realistic future strategies and plans. Over the years, researchers continued to emphasize the importance of CI to firm strategy and survival, having referred to it as "a key to marketplace survival" (Gordon 1982, p. 69), "a key element in the strategic management system" (Bernhardt 1994, p. 12), and "the key determinant of a strategy" (Montgomery and Weinberg 1979, p. 41). Similarly, Rottenberger (1991) postulated that information about competitors' pricing, quality, and service is vital for sales and marketing efforts. Referring to CI as "commercial intelligence," Hershey (1980) documented the appropriateness of CI for small businesses in particular, providing suggestions about how small and moderate-sized organizations can incorporate CI into their operations to get a competitive edge against larger organizations. Consequently, there appears to be widespread agreement among researchers regarding the value that CI holds for organizations.

More recent attempts to better define CI continue in the same vein. Gordon (1989), for instance, defined CI as collecting information about competitors to gain a competitive edge in the marketplace, whereas West (2001) described it as an organization's commitment and ability to study competitors and to anticipate their actions. Prescott and Gibbons offer a more intricate definition of CI, calling it a "formalized, yet continuously evolving process" and suggesting that it can help managers achieve and sustain competitive advantage through evaluating the "capabilities and behavior" of existing and prospective competitors (1993, p. 8). Fleisher and Blenkhorn broaden the definition by defining CI as "the process by which organizations gather actionable information about competitors *and the competitive environment*" (2003, p. 5, emphasis added). The Strategic and Competitive Intelligence Professionals currently defines CI as "the process of monitoring the competitive environment and analyzing the findings in the context of internal issues, for the purpose of decision support" (www.scip.org/content.cfm?itemnumber=2214&navItemNumber=492/).

While it is beyond the scope of this paper to develop an overarching definition of CI, from the above definitions some common themes do emerge. Most definitions discuss CI as an organizational-level process focused on competitors or the competitive environment that result in knowledge that can be used to gain competitive advantage and anticipate competitive actions. Although not explicitly stated in these definitions, one can assume the purpose of engaging in OCI would be to utilize the knowledge gained to lead to superior performance. Furthermore, it can be assumed that, generally speaking, OCI is more of an input to strategic, as opposed to tactical, decision making. Thus, one could argue that OCI is knowledge about competitors or the competitive environment that can be utilized as an input to strategic decision making for the purpose of enhancing organizational decision making and performance.

CONCEPTUALIZATION OF SALESPERSON COMPETITIVE INTELLIGENCE

Based on the discussion of OCI and CI presented in the previous section, we define SCI as individual-level knowledge about

competitors and the competitive environment that can be used tactically to aid in enhancing salesperson performance. In this section, we use four characteristics of information to try to draw a clearer distinction between SCI and OCI. The four characteristics are (1) *tactical versus strategic use,* (2) *longevity of use,* (3) *intelligence availability,* and (4) *time orientation of the intelligence.* We want to be clear that we do not believe that these are dimensions of SCI but, rather, use these four elements to attempt to better delineate SCI from OCI.

Importantly, differentiating knowledge from information, Nonaka postulated that "information is a flow of messages, while knowledge is created and organized by the very flow of information, anchored on the commitment and beliefs of its holder" (1994, p. 15). In another definition, Boisot defined information as "data that modifies the expectations or conditional readiness of an observer" (1999, p. 20), and knowledge as a "set of expectations that an observer holds with respect to an event" (1999, p. 20). These theoretical standpoints underscore the notion that information is different from intelligence, which we view is more similar to knowledge as defined above. Information becomes knowledge when assimilated into some useful form that is similar to intelligence; however, we believe that intelligence is more selective based on the qualities identified below.

Tactical Versus Strategic Use

Organizations have increasingly moved toward relationship-oriented models of managing buyer–seller relationships and incorporated consultative selling perspectives into the sales process. As a result, this has led to increased job ambiguity on the part of the salespeople as they are asked to not only meet the needs of their organization but also to act in ways that are in the best interest of the clients with which they work. To effectively operate in an environment that requires them to satisfy two groups that often have very different demands, salespeople need information that provides the greatest degree of tactical decision-making ability particularly with regard to tasks that need to be completed immediately. This is also driven by the fact that many organizations have decentralized decision making for the specific purpose of providing salespeople, among others who interact regularly with the external environment, the greatest ability to act autonomously. For example, service providers have acted to empower frontline service employees to make many decisions in order to quickly, and perhaps more effectively, deal with service failures. Likewise, salespeople must have information that allows them to quickly respond to issues raised by customers. Customers will often request that actions taken by competitors be met or exceeded (e.g., lower prices, different delivery times/procedures, changes in billing practices), and it is critical that the salespeople have information about competitors that can be utilized tactically. Therefore, salespeople need to be able to assess any information they receive in order to determine the extent to which that information can be utilized as SCI.

While it is true that organizations act tactically, it is generally only through those who interact with the external environment, such as salespeople, that this occurs. Generally speaking, OCI is more focused on strategic decision making. Gilad (2003) has labeled one element of this "strategic early warning," which he argues focuses on how the organization should prepare to deal with changes in the competitive environment occurring over a prolonged time period. He acknowledges that tactical intelligence is needed but argues that it tends to be more focused on issues related to sales, which is consistent with our presentation above. Another reason that OCI tends to be utilized more from a strategic perspective at the organizational level has to do with the simple fact that it takes time for information to flow into the organization. Regardless of the sophistication of the information technologies employed by the firm, there will be a delay between when information is gathered and when it will be made available for use in decision making. Thus, due to the time delay between the generation and dissemination of information within the organization, it is likely that any CI utilized in an organizational decision-making context will be related primarily to strategic decisions rather the tactical decisions. However, this should not be read to mean that OCI will *only* be used to make strategic decisions. Just like salespeople, organizations often have to react quickly to changing environmental conditions, thus OCI can be utilized in a tactical manner as well as a strategic one.

Longevity of Use

For salespeople, every assignment brings a new challenge. Therefore, salespeople need to update, modify, or alter their plans according to the changing needs of their customers (Weitz, Sujan, and Sujan 1986) and to the ever-evolving tactics of their competitors. Exploring the role of salespeople in a marketing information (i.e., CI) system, Evans and Schlacter (1985) argued that aside from completeness and accuracy, "timeliness" is the most important factor that salespeople must consider when assessing CI. Because information seldom retains its value in today's ever-changing, dynamic environment, information about competitors should be treated as a perishable good (Hannon 1997). Reinforcing this point, Powell and Allgaier (1998) argued that intelligence data might turn into a useless product if it is not promptly communicated.

Today's salesperson is constantly challenged to do more in less time. In order to sustain and survive in this "time-based competition," salespeople should use CI in their everyday operations. George Stalk, Jr., senior vice president of Boston Consulting Group, proposed the idea of time-based competition and argued that "like competition itself, competitive

advantage is a constantly moving target" (1988, p. 41). As a consequence, salespeople should not delay in leveraging valuable information about competitors as it may lose its value to serve a competitive purpose over time.

As organizational decision making requires information that is as current as possible, OCI should also be timely. However, much of the decision making that occurs in the organization has a long-term orientation. Because of this nature, the information required at the organization level generally has a longer life than that which might be used at the salesperson level. Further support for the contention that OCI is likely to have a longer life than SCI can be illustrated by the fact that even in light of calls to modify the decision-making process in organizations to allow quicker reactions to environments that have become more hostile, turbulent, and dynamic (Huber and McDaniel 1986), organizational decision making is often still slow to come about. Regardless of the type of information system being utilized, it is difficult if not impossible for the most current information pertaining to a decision to be disseminated to all pertinent decision makers in a timely fashion. Interestingly, one implication of this is that information initially transmitted to the organization from salespeople may eventually be directly cycled back to the salespeople after being transformed into OCI or indirectly cycled back via changes in organizational strategy or structure. To be clear, our point is not that timely information is not important at the organizational level, but rather that it is often difficult if not impossible for the timeliest information to be utilized with regard to a decision-making task due in part to the inherent lag between when that information is collected and when it reaches decision makers in the organization.

Intelligence Availability

In today's technology governed business environment, getting competitors' information is not a difficult task. General market information can be collected from numerous secondary sources, including media broadcasts, annual reports, books, popular press, trade shows, publicly available databases, and various Internet sources. However, information will only rise to the level of being an effective intelligence product to the extent that it is gathered from the salesperson's exclusive information sources (i.e., customers, market informants, and colleagues, etc.). Simon argued that "it is of little competitive advantage to know only what others know" (1993, p. 136). Emphasizing the importance of this point, Allan Lombardi, former director of intelligence operations at Educational Testing Services, stated, "what's available on a secondary basis is history, which is sometimes ancient history" (Mellow 1989, p. 26). Therefore, a salesperson possessing information that is not readily available to others can become more self-efficacious and can proceed to believe that he or she is the sole owner of this information, at least for a period of time. Importantly, though, as widespread availability and accessibility depreciates the value of information, this may still help a salesperson in the strategic decision-making process.

At the organizational level, it is unlikely that the firm will have information that is not in some way available to others. This is in large part due to the issue associated with timeliness discussed above. In addition, just as one firm is engaging in activities to gather competitive information, so, too, are competitors, meaning that information known to one firm is likely to be known to another. This may not be true at the SCI level where a salesperson can leverage specific contacts or combine insights they have with other generalized information to create knowledge that they alone can act on. Furthermore, much of what becomes OCI may be provided by salespeople and other boundary spanners or gathered via normal environmental scanning activities. While information collected by salespeople may be unknown to others at the time it is collected, the dynamic nature of the sales environment implies that others are likely to gain access to that information very quickly. Thus, it is unlikely that this information will be unknown to others as it transitions from SCI to OCI. Of course, any information gained via traditional environmental scanning activities is information that, by default, will likely be known by competitors.

Time Orientation of the Intelligence

Although time orientation is a subcomponent of all other attributes, we treat it separately because of the fundamental role it plays in the SCI construct. As discussed above, organizational decentralization and empowerment put salespeople in a position where they must be able and willing to utilize intelligence in real time to make decisions. Thus, SCI is valuable to the extent that it allows a salesperson to act immediately, proactively, and appropriately in specific sales interactions with customers. The tactical nature of decision making at the salesperson level causes SCI to be less future oriented than that which may be used in a traditional organizational decision-making context where strategic decision making is of greater concern. This is not to say that SCI is information that lacks long-term value. In fact, as noted above, there may very well be a feedback loop in which what began as SCI eventually comes back to the salesperson after being filtered through the organization. However, the nature of the salesperson–customer interaction is such that oftentimes information requirements are likely to be more short run in orientation than at the organizational level.

The purpose of this section was to outline what we believe to be four qualities of SCI that distinguish it from OCI. Table 1 provides a summary of the differences that we believe exist between SCI and OCI. Notably, throughout these dis-

Table 1
Competitive Intelligence Qualities Comparisons

Competitive Intelligence Qualities	Salesperson Level	Organizational Level
Tactical Versus Strategic Use	Use of intelligence is tactical in nature to complete immediate selling task. Used as a tool to develop a sales strategy for decentralized, autonomous sales activities. Intelligence worth determined upon receiving by the salesperson.	Organization use of intelligence is primarily strategic in nature. Used to develop more complex responses that take into consideration longer-term implications. Requires collection, analysis, and response from policymakers to determine overall value.
Longevity of Use	Intelligence has a limited life span. Used during sales interactions and for future interactions. Expires when competition changes behavior or strategy. Life span also subject to organizational response and strategic direction.	Length of use dependent on organization's strategic response. Could lead to entire organizational change or restructuring. Filtered back to the sales force for use in future sales interactions. Intelligence may be apparent in future intelligence reports based on feedback loop between the sales force and the organization.
Intelligence Availability	Not readily accessible to others. Gathered from customers, other salespeople, and fellow colleagues.	Disseminated throughout the organization. Gathered from salespeople within the organization or through environmental scanning activities.
Time Orientation of the Intelligence	Intelligence is immediately actionable and can be used upon receipt. Can be used for future interactions until a strategic response is received from the organization. Short-term orientation that will change based on organization or competition.	Intelligence incorporated into future sales calls after organizational response. Intelligence is used for long-term strategic planning efforts. Delivers input for managerial decision-making processes involved for future decisions.

cussions, we have argued that SCI provides salespeople with a competitive advantage that can be leveraged to enhance performance. Below, we present the CI process.

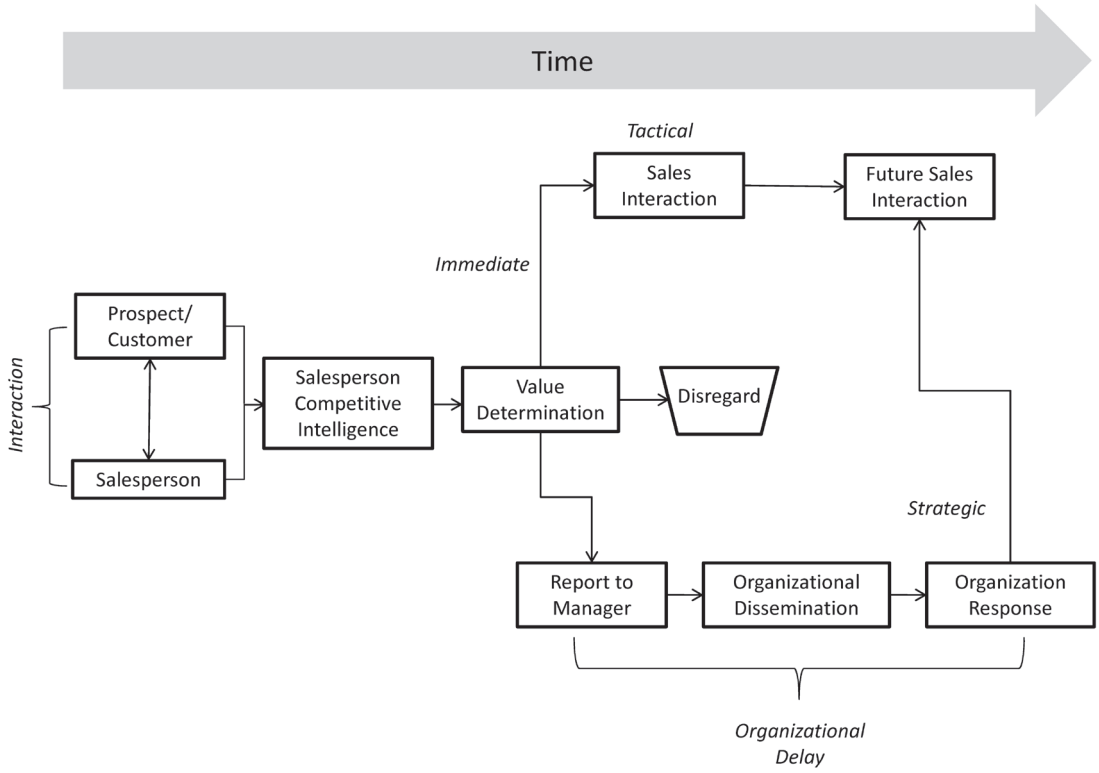
STAGES OF SALESPERSON COMPETITIVE INTELLIGENCE

To this point, we have defined SCI and utilized four issues to more clearly differentiate SCI from OCI. In reality, however, it is difficult to separate the forms of intelligence because of the ways in which they are closely intertwined. In order to gain a better understanding of how CI is created and decipher the process through which CI is both used by the salespeople in the field and developed at the organizational level for marketing activities, we present a flowchart of the stages of CI (see Figure 1).

In order to explicate the SCI process represented in Figure 1, we adopt a number of concepts from the extant literature in sales force automation (SFA) and customer relationship management initiatives (CRM). A basic premise of the sales technology literature is that SFA is a tactical tool that can be used in isolation to enable a sales force to be more effective and efficient (Ahearne and Rapp 2010; Rapp, Agnihotri, and Forbes 2008) or, ideally, can be used as a means to collect customer information that enables an organization to develop and implement a CRM-based strategy to improve both individual performance and overall organizational performance (Moutot and Bascoul 2008; Raman, Wittmann, and Rauseo 2006). Supporting this idea, Hunter and Perreault (2007) suggested that sales technology takes different forms at different levels. For example, basic "technology tools" at the salesperson level have operational orientation, whereas "macro-level business processes" at the organizational level have a strategic orientation (Hunter and Perreault 2007, p. 17). Parallel to this, we present SCI as a tactical source of information that permits a salesperson to gain immediate benefits, but which can also transition into OCI and thereby influence the organizational strategy and response.

As seen in Figure 1, the information generation process begins with an initial interaction between a salesperson and a customer, prospect, colleague, and so forth. The outcome of these interactions is that some piece of information is disclosed to the salesperson (Naylor 2008). At this moment the salesperson is armed with this new information and can act on

Figure 1
Stages of Salesperson Competitive Intelligence



it as he or she sees fit. An implicit assumption of our view is that once the salesperson is equipped with the information, he or she will place some value on it and then use it accordingly. At this point, we should recognize the difference between declarative and procedural knowledge. Simply speaking, declarative knowledge represents factual knowledge about a situation (e.g., how a competitor may be planning to change their distribution philosophy), whereas procedural knowledge is about knowing how to best perform a task. Similarly, it is not enough for information to be valued to the point that it becomes SCI (i.e., declarative knowledge) but it is also critical that salespeople have procedural knowledge or an understanding of how to most effectively utilize SCI. Although we do not undertake the challenge of identifying the antecedents of use in this paper, we believe that there are opportunities to identify factors that may promote or inhibit the actual usage of the information collected.

Once a determination of the value of the new information has occurred, we believe a salesperson has two potential actions that can be taken. If the information is not perceived as valuable, the salesperson will likely disregard it. However, if the information is deemed as valuable, and thus becomes intelligence, the salesperson then can engage in one of two behaviors, or both. First, a salesperson can choose to immediately integrate that new intelligence into his or her current sales call or in future sales interactions. The decision to incorporate this new intelligence in the sales interaction is tactical in the sense that there is the belief that such intelligence can have a direct effect on the individual's buying decision. It is also possible that the salesperson may use this intelligence to change his or her behavior and engage in more effective adaptive selling behaviors. However, it should be noted that at this stage, the intelligence is still in a very raw form and must be interpreted and presented with care by the salesperson.

For example, a recent conversation with a medical device salesperson demonstrated the importance and value of the immediate use of intelligence. Upon speaking with a customer, the salesperson uncovered that his or her primary competitor had fallen behind on catheter device production and was facing a potential stock-out within the upcoming days. Armed with this intelligence, the salesperson then immediately called on the customers that used some of the competing products and prospects that were fully engaged with the competitor. This intelligence, once verified by the customers by calling their current supplier, led to a massive influx of sales and the aversion of a potential disaster in their area of health care.

There are a number of similarities between the process described above and the utilization of SFA practices. First, a customer provides a salesperson with some information regarding his or her personal life, past buying behaviors, or-

ganizational needs, and so forth and then these needs can be captured in an SFA system (Buttle, Ang, and Iriana 2006). It is then the decision of the salesperson as to whether that information should be put into the technology system or disposed of. If the salesperson inputs that information and it is viewed as valuable, it can then be used in that interaction or in future sales interactions. As past research has shown (e.g., Ahearne et al. 2008), information garnered from the customer can also change a salesperson's behaviors and, ultimately, performance.

As shown in Figure 1, the other avenue a salesperson has relative to this information is to report it back to the organization (Festervand, Grove, and Reidenbach 1988) assuming that the salesperson considers the information to be valuable or feels the organization can provide assistance in determining how to best utilize it. This intelligence can be reported to the sales manager or some entity within the organization that addresses OCI concerns. From here, the intelligence may be disseminated throughout the organization where it is analyzed and then synthesized into some usable, organizational response. The outcome of this process is a strategic response that can either change the direction of the organization or can be reported back to the salesperson for use in future sales interactions. Unfortunately, however, previous research indicates that some organizations' cumbersome standard operating methods and entrenched attitudes and functions often delay the implementation of OCI (Fleisher 2000). Therefore, managers need to find ways to make the complex and often bureaucratic organizational response to intelligence operate more efficiently so that employees, especially customer-facing personnel such as salespeople, can have the most current and relevant intelligence available in order to maximize the possibility of individual and organizational success.

Here again, we see the process as parallel to SFA usage affecting a CRM strategy. Once the intelligence is reported into the SFA system and back to the organization, the company can then use it to create new customer relationship-building strategies. Within an organization, this intelligence is used in a variety of organizational decisions, including the creation or development of programs such as new loyalty or customer lifetime value programs, new product development, or inventory planning (Chen 2005).

In this context, an example of OCI can be seen stemming from discussions with a Fortune 500 industrial selling firm. This firm has over 2,000 salespeople with hundreds of managers working at various levels. Speaking with the individual salespeople, a common theme that emerged was that competition at both the regional and national levels was vital to their success. It became critical that any information gathered could be used not only on a specific sales call but it could also be disseminated back into the organization so that other salespeople could access it and the organization could determine the appropriate response. Responses varied among things as minor as wording changes in brochures to things as substantial as changing entire selling models or new equipment development.

Based on the above presentation, it would appear that SCI can be valuable on multiple levels. With many firms developing CI programs, sales managers need to be proactive in collecting information from their sales representatives and reporting it back to the OCI unit. As practitioner reports suggest that the sales force is not viewed as a primary source of CI (Global Intelligence Alliance 2005), sales managers need to take the initiative in creating formal reporting systems or procedures. Also, synthesis and organization of intelligence in such a way that it can be utilized as an actionable tool is challenging. Thus, managers and salespeople need to work together through continuous involvement and interactions to overcome this challenge (Naylor 2008).

COMPETITIVE INTELLIGENCE RELATIONSHIP WITH PERFORMANCE (VALUE)

It is our position that to be of substantial practical impact to salespeople, the demonstration of the link between SCI and salesperson performance is essential. Just as organizations will rely on OCI to aid them in maximizing organizational performance via the strategic decision-making process, SCI will aid salespeople in their day-to-day relationships with customers. From a contingency framework perspective, we suggest that SCI will benefit salesperson performance when certain factors, characteristics, or situations are present. Furthermore, we believe that SCI will benefit aspects of salesperson performance, those being the professional side (outcomes for organization) and the personal side (outcomes for an individual) (Miller, Heiman, and Tuleja 1985). While the focus of past CI research has emphasized organizational outcomes (e.g., enhanced strategies, new products or services, and return of investment), our focus is on individual-level outcomes accruing through the use of SCI. Ultimately, individual outcomes are of value at the organizational level as presented in Figure 1. This can primarily be attributed to the fact that the organization succeeds only to the extent that individual employees succeed. With regard to sales, this is all the more true as the organization's level of sales is a direct function of the level of sales occurring at the individual level. Thus, as SCI enhances individual-level success, these successes can be beneficial to the organization.

As mentioned, we argue there are three primary avenues for SCI to influence a salesperson: (1) salesperson behaviors, (2) relational or customer-related outcomes, and (3) objective performance. As a sales manager, it is critical to gain a deeper understanding of the SCI process and the potential outcomes in order to better leverage the intelligence and enable the sales force to be more effective. It is important to note that

we believe that SCI has a multitude of potential outcomes. Our limited discussion does not attempt to present every potential outcome, but rather directs future researchers to those areas that we argue will undergo the most impact from increases in SCI. Finally, as in most research, we propose that as the quality levels of SCI increase, the influence of this SCI will also increase. As in SFA/CRM systems, the better the information collected and entered, the greater the effects when used later.

In regard to salesperson behaviors, SCI is much more than just knowing about one's competitors. Rather, it is unique intelligence about competitors that can provide insights regarding one's actions and directional moves (Prescott and Gibbons 1993). Therefore, it is logical to anticipate that SCI has the potential to influence salesperson performance by benefiting salesperson behavioral outcomes such as adaptive behavior, communication, service behaviors, and customer-oriented selling. These outcomes, as suggested by Behrman and Perreault (1982), are aligned with the behavioral measures of salesperson performance such as successfully attaining quantity and quality sales goals, transferring information, developing and using technical knowledge, and making effective sales presentations. In order to engage in the above-mentioned behaviors, salespeople not only need intelligence about both customers (i.e., declarative knowledge) and competitors but they also need to know how and when to incorporate that information into their selling process (e.g., procedural knowledge). Notably, SCI will be useful for keeping salespeople informed, as well as for developing, implementing, and revising sales plans. With SCI, salespeople can better anticipate customer responses, prepare appropriate ways to meet customer needs, and overcome customer objections. This deeper understanding of the competitor will provide salespeople with even greater insight on the selling environment and customer needs, thereby enabling them to adapt their selling style, provide only that information which is relevant to the customer, and provide a higher level of perceived service.

Second, relational outcomes include items such as trust, customer satisfaction, and retention/loyalty. By considering these different outcomes, we are attempting to capture both sides of the dyadic relationship. Researchers have argued that a salesperson's actions during a sales encounter influence trust (Swan and Nolan 1985), customer satisfaction with the salesperson and the product (Oliver and Swan 1989), and ultimately, customer retention (Rust and Zahorik 1993). In order to be reliable and responsive, salespeople must seek out market, competitor, and customer-related information in order to anticipate changes in the external competitive environment. As previous research indicates, high-performing salespeople effectively plan and maintain a high level of knowledge concerning their products, customers, and competitors (Sujan, Weitz, and Kumar 1994). SCI fills this need as it relates to competitors and, in turn, should help salespeople satisfy their customers and gain greater trust and loyalty by having a better understanding of the sales environment and opportunities.

Third, we believe that SCI can have a direct influence on the objective measures of salesperson performance. Measures such as the market share of the branded product or service represented by a salesperson within his or her assigned territory that considers both the concerned firm's products sales and the competitor's products sales (Rapp et al. 2006) or other various performance measures, such as sales as a percentage of quota or market potential, total sales volume, or number of total calls, may be influenced by a salesperson's use of SCI. We believe that being armed with more intelligence will enable a salesperson to close more sales and demonstrate less effort in the process, thereby shortening the sales cycle and allowing time for other selling-related activities. Additional selling time and increased sales activities will both have a direct relationship on the aforementioned performance outcomes.

As suggested by Weitz (1981), the relationship between salesperson behavior and performance is contingent upon characteristics of the salesperson and situational factors. For example, Franke and Park (2006) empirically demonstrated that the relationship between performance and individual characteristics varies across sales circumstances. We believe that the level of expertise that resides within a salesperson can significantly influence the relationships mentioned previously. Salespeople who have broader knowledge structures and are deemed as experts in the related field have a greater ability to process the information gathered. A salesperson's cognitive ability stems in part from stored knowledge based on past sales experiences, and ultimately leads to higher-order learning (Jones, Chonko, and Roberts 2003). Highly knowledgeable salespeople have more developed cognitive skills that enable them to anticipate customer responses and prepare appropriate solutions to meet customer needs and overcome customer objections. As expertise manifests itself in experience and knowledge levels, we believe that "expert" salespeople can gain greater benefit from CI collection and usage.

A final area of deserved attention regards the notion of SCI and fit to the selling situation.[1] Interestingly, as presented by Vorhies and Morgan (2003), the fit construct is discussed where certain behaviors can have more meaningful outcomes based on relevance to the situation. There is a strong likelihood that greater quality and use of SCI can lead to behaviors that fit the selling situation. For example, there are times when lower service levels may be appropriate especially if a salesperson is aware that a competitor is either overservicing or overpricing his or her customers. The idea of fit to the selling situation is applicable to the use of SCI during the sales interaction and could be a contributing factor to increases in performance gains.

For future researchers, while it is probable that SCI will have some correlation with salesperson performance, there are other, more complex links that should also be considered.

We expect that there are intervening variables that fall under the broad categories of salesperson behaviors and relational outcomes that facilitate the transfer of increases in SCI to gains in subsequent performance. This point is aligned with industry practices, given the fact that the Competitive Intelligence Foundation reported customer satisfaction as the most widely used criteria for assessing CI effectiveness, which can then influence hard measures of performance (Fehringer, Hohhof, and Johnson 2006).

THE DARK SIDE OF SALESPERSON COMPETITIVE INTELLIGENCE

In the previous section, there was a general assumption made that higher-quality SCI can demonstrate positive relationships with a series of individual-level outcomes. However, it is important to discuss that there may be a dark side to SCI. Throughout this conceptualization, we have viewed and presented SCI as a positive, performance-enhancing tool that salespeople can leverage to achieve success. As with any tool or technology, there are costs associated with their use and, when used inappropriately, can damage relationships and have detrimental effects on performance. We believe there are several areas of concern (some of which we discuss below) because of their potential negative implications on success.

With increases in any type of knowledge or intelligence that is not common across all parties, there is an opportunity for unethical behavior. As it relates to OCI, there has been quite a bit of research relative to the misuse of CI at that level. In fact, the potential for ethical lapses was so great that in 1996, the United States signed into law the Economic Espionage Act (EEA), which prohibits the stealing of or otherwise gaining of trade secrets by fraud. Subsequent to this and in response to concerns raised by CI practitioners as to the impact of the EEA on CI practice, Horowitz (1999) wrote a policy analysis in which he concluded that there existed sufficient differences between ethical CI practices and those actions addressed under the EEA to lead to there being a clear difference between them. In other words, what might be labeled *corporate espionage* is not the type of activity that is engaged in by practitioners of CI. However, there exists the real danger of not knowing when one has crossed the line between what might be acceptable and what is not. Needless to say, this same concern exists at the individual level. Thus, salespeople who utilize SCI must be careful that in their pursuit of enhanced performance, they do not cross the line into what might be considered unethical or perhaps even unlawful activities.

Other areas of SCI concern hinge on the quantity and the quality of the intelligence gathered. Research in information theory and environmental scanning provide evidence for reasons how the quality and quantity of information gathered could be damaging to performance. From an information theory perspective, information can be considered as a resource that needs to be collected and managed (Burk and Horton 1988). Information becomes intelligence if it can reduce decision-making uncertainty and change one's decision-making process (Emery 1969). Hence, field information surely can be considered as a resource of influence to adjust products' value proposition. However, one can assume that the bulk of information that is gathered is incomplete and unverified until it travels through the appropriate organizational channels. Obviously, using information that has not been validated could lead to disastrous results. Our argument also evokes the idea that relatively less-experienced salespeople are more likely to be victims of "imperial intelligence," that is, when intelligence becomes the overriding factor in decision making (Shulsky 1993) even if it may not be the appropriate intelligence to use. Furthermore, attempting to sift through information gathered could consume an immense amount of time, which leads us to our third concern of time allocation.

As salespeople gather or sort through information, these activities are carried out at the expense of other selling activities. As sales managers are well aware, a salesperson has hundreds of activities that they must engage in on a daily basis. A question arises on how much time a salesperson should allocate to selling activities versus information gathering versus other activities. The issue of opportunity costs presents itself when asking how much effort a salesperson should be investing in these activities. It is possible that a salesperson may spend more time probing for information than is necessary, thus influencing performance.

As a related point, there would appear to be a point of inflection regarding the quantity of information, where too much can cause overload, leading to a situation where the salesperson is unable to efficiently sort through the information and meet the customer needs in an effective manner. From an environmental scanning perspective, information is valuable and can assist management in planning the organization's future course of action (Auster and Choo 1993). Similarly, environmental scanning on behalf of the salesperson may help them uncover desirable information for situational interpretation and to modify decision making, but there also appears to be a dark side associated with this excessive scanning. As presented by Choo (2002), a poorly managed scanning effort can lead to negative outcomes such as information overload, confusion and disorientation, and high costs in lost opportunities. Thus, there appears to be a paradoxical relationship between the amount of SCI and the ability to influence performance. Because the volume and value of information may form or transform salespeople's representation of their customers' needs and expectations (MacKay 1969), SCI may

have a positive influence on performance, however, the time and effort required to sort through and understand the information may have a negative effect on performance.

SCI can help salespeople define and understand their industry and identify rivals' strengths and weaknesses. Done properly, CI can enable a salesperson to avoid surprises by anticipating competitors' moves and decreasing response time; however, as discussed, there are potential outcomes to this intelligence, especially if mismanaged.

DISCUSSION

To date, the OCI literature has focused on organizations as opposed to individuals. However, employees, especially boundary spanners, often have the potential to collect and utilize CI effectively because they are "closer to the source." Moreover, researchers have argued that an organization must have a competitor-oriented workforce in order to achieve and sustain competitive advantage (West 2001). Our goal in this research was to develop the concept of SCI, which we argue is anchored at the individual salesperson level, and to outline the characteristics of SCI. We formally define SCI as individual-level knowledge about competitors and the competitive environment that can be used tactically to aid in enhancing salesperson performance. This paper strengthens the theoretical foundations of sales research by integrating the views of both researchers and practitioners from the marketing, strategic management, human resources, sales force management, and CI literatures.

The majority of past research in this area, in contrast, has examined CI as an organizational-level construct focused on the processes associated with gathering and disseminating CI within an organization. However, we conceptualize SCI as the outcome of intelligence processes and believe its primary impact is at the individual salesperson level. Our effort represents the first at conceptualizing SCI, differentiating it from OCI by reviewing a series of CI qualities, and advancing a process model outlining the intelligence process. We believe that this individual-level conceptualization of CI supplements the service dominant logic perspective defined by Vargo and Lusch (2004). A service dominant logic perspective does not consider marketing as a mere exchange of tangible goods, but rather focuses on supporting customers in the value-creation process and discovering superior core competencies in an effort to acquire competitive advantage (Vargo and Lusch 2004), which is what we believe the collection and use of SCI accomplishes.

At a broader level, the purpose of the aforementioned discussion about considering CI as an individual-level construct has been to bring attention to this widely neglected determinant of salesperson performance. Despite the abundance of frameworks linking different salesperson-related variables and performance, superior performance is likely to be enhanced when salespeople identify new sources of CI and react to or utilize it faster and more proficiently than their competitors. The brief discussion offered on the CI–performance chain is intended to encourage academicians to extend this debate and to focus their interest on the individual-level CI concept. We offer that sales researchers should not only concentrate on the link between the salesperson and customer, but also address the question of how competitors' intelligence can weaken or strengthen this link. Moreover, SCI may provide the opportunity to bring in the much needed focus of the "competitor" to the salesperson–customer–competitor triangle.

Managerial Implications

The concept of competitor orientation is not new. In fact, the previous literature pertaining to market orientation either explicitly (e.g., Narver and Slater 1990) or implicitly (Kohli and Jaworski 1990; Kohli, Jaworski, and Kumar 1993) highlights this notion. However, the past conceptualization of competitor orientation does not include the links between competitors' information and individual salesperson behaviors or performance. As practice also often ignores the role of CI for salespeople, the current study focuses on the effects of CI at the individual level and widens the salesperson's role *beyond* sharing competitor information to actually embracing and using intelligence to respond to competitors' actions.

Although our research is conceptual in nature and raises as many questions as it may answer, which we believe should be one objective of conceptual research, we believe our presentation offers notable points for organizations and managers to consider. As many sales managers are becoming more pressured to justify their budgets, the ability to demonstrate bottom-line results is becoming paramount. We believe the concept of SCI provides a number of specific managerial implications related to influencing results and adding additional value. First, sale managers *must* realize the fact that their sales force is an extension of the organization and has access to dynamic types of information as opposed to more filtered, static public and secondary sources. With this in mind, we believe the firm can benefit greatly from assigning salespeople a wider role in OCI activities. Increasingly, business executives devote a significant share of their resources toward apprehending, thinking, and learning about external surroundings in addition to spending a considerable amount of their time scanning for this strategic intelligence. This can be facilitated through sophisticated coordinating mechanisms such as teams, CI human resource allocation, the planning process, interaction, and networks; but this does not appear to be the current state of practice. For example, an industry report suggested that only half of the companies responded to their survey capture marketing and competitor intelligence

from their sales offices (Powell and Allgaier 1998); however, these respondents suggest two areas where CI has considerable effect is in sales-related activities–qualification and bid support. Reinforcing this notion, a more recent study (Fehringer, Hohhof, and Johnson 2006) suggested that the most prevalent method to assess CI effectiveness is through customer satisfaction ratings, yet more than 40 percent do not collect CI from company employees. Both of these reports emphasize the importance of sales-related activities and customer outcomes and their relationship with CI, without considering the sales force as a source of CI. This suggests a misalignment in CI strategy considering that the sales force represents one of the few groups of customer-facing personnel in an organization positioned to collect valuable intelligence *and* influence customers. It would appear obvious that salespeople with a high level of SCI can become an important source of intelligence for managers. Moreover, SCI can be an essential tool in the scanning effort. With many firms developing CI programs, sales managers need to be proactive in collecting intelligence from their sales representatives and report it back to the CI unit. As practitioner reports suggest that the sales force is not viewed as a primary source of CI, sales managers need to take the initiative in creating formal reporting systems or procedures while promoting a two-way flow of information. Also, synthesis and organization of intelligence in such a way that it can be utilized as an actionable tool is challenging, thus managers and salespeople need to work together through continuous involvement and interactions to overcome this challenge.

Our research suggests that it is important to ensure that the sales force does not neglect intelligence regarding competitors. From a time allocation viewpoint, it may be challenging to dedicate an entire training program to gathering and using CI, but managers must incorporate the role of CI into their training modules. With CI having its greatest impact on sales-related activities, it is surprising to consider that less than half of professionals frequently utilize CI to support their sales/business development activities (Fehringer, Hohhof, and Johnson 2006). Parallel with our research view, it appears that salespeople that have CI may be using it without any formal guidance, suggesting that there is the potential to improve behaviors and outcomes if the intelligence is leveraged more effectively, which could be accomplished through training exercises. Specifically, one area where training might prove useful is in providing guidance as to which pieces of intelligence are valuable and which are not. It is our view that SCI will eventually become OCI if passed back to the organization via some formal reporting process. However, if there is a misalignment between what the salesperson and the organization believes is valuable, inefficiencies in getting the appropriate intelligence disseminated within the organization will emerge. Furthermore, such misalignment may lead to the salespeople acting on intelligence that is inconsistent with what would be valued by the firm.

Perhaps the most challenging aspect for managers is deciding what performance metrics should be used to determine the value of the CI collected as well as the appropriate usage of the intelligence. Considering that it is possible that the costs of collecting and evaluating the CI could override the actual value gained, the right measures have to be selected. As this research does not address that question, we suggest that managers use both a process measure of salesperson behavior as well as linking those behaviors to performance gains such as increases in market share or percent-of-wallet. To best track these gains (or losses), managers should incorporate a CI training module into their training program and assess the performance trajectory for a period of time after the intervention. Once final gains (or losses) are determined, managers can compare them to the time spent training against lost sales to determine an overall value of the program.

The arguments above suggest that a firm should ensure that its sales force is perceptive of changes in the external environment and possesses critical CI for enhanced performance. Therefore, sales managers should be sure to communicate to their salespeople the importance of engaging in intelligence activities. Such support from managers will aid salespeople in building an insightful perspective of the market, and to help secure the competitiveness of the organization. Unfortunately, salespeople often consider CI activities as tangential tasks that are unrelated to selling (LeBon and Merunka 2006). Accordingly, a challenging task for managers is to motivate salespeople to get involved in such activities. One method to do this might be to highlight the influence that SCI may have on an individual salesperson's performance. Knowing that intelligence related to competitors is gathered for the sake of themselves as well as managers, salespeople may not regard CI activities as an extra burden. Moreover, CI activities will not be considered nonsales tasks of which salespeople are unsure of the outcomes of their expended efforts. Instead, salespeople will find motivation in terms of enhanced performance, both for themselves and for the organization.

Finally, managers need to be cautious regarding salespeople's effort to collect and utilize intelligence because it has the potential to lead to legal and ethical issues. SCI that is gathered from top management must be handled and used cautiously by an individual salesperson because of its proprietary and confidential nature. Also, salespeople are known to exert varying degrees of effort in collecting competitive data (Attaway 1998), which may lead to incomplete or inaccurate intelligence. There exists the possibility that intelligence that is collected may be subjectively biased by the salesperson and that the intelligence a salesperson distributes to the organization may inherently contain some level of subjectiveness because of varying levels of experience and expectations. All these issues,

if not handled appropriately, could cause damage to a firm or a salesperson's relationship with a customer. To remove the confusion surrounding CI procedures and objectives, managers should develop explicit CI guidelines.

Future Research Directions

A goal of this research was to promote thought and discussion on what we believe to be an underresearched topic. As it is impossible for a conceptual presentation to address every possible aspect of the topic at hand, we believe our presentation leads directly to countless research opportunities and would like to highlight a few of those below.[2] We hope that our ideas pave the way for these future research endeavors.

Valuing Salesperson Competitive Intelligence

Explicit in our presentation is the fact that salespeople should actively gather competitive information, act on it, and eventually pass it back up to the organization where it will likely become OCI. A critical question that needs to be answered is the specific criteria salespeople may use to value the information they gather. It is well known that not all information is useful and that the amount of information that can be collected is constantly increasing. Knowing more about which pieces of information actually rise to the level of becoming CI would be useful, as would knowing how to better train salespeople to identify and act on that information. Another interesting question might be the extent to which the ability to recognize and utilize SCI differs based on the experience of the salesperson, and if a difference is found, whether it is due solely to experience or if there are industry or other effects. Finally, is there an optimal amount of SCI that should be gathered and used? It may be that the relationship between SCI use and effectiveness is curvilinear, specifically in the form of an inverted-U shape.

Misalignment Between Salesperson and Organizational Valuations

Somewhat related to the issue raised above is one related to what happens when salespeople value information that is not deemed valuable by the organization. Or, using our nomenclature, what happens when what is deemed SCI by the salesperson is not deemed OCI by the firm? This is particularly problematic when salespeople are able to effectively utilize SCI. Does this mean the perceived intelligence needs of the organization are misaligned with what is actually necessary to operate successfully? If so, in which direction should alignment occur—with salespeople changing what they consider SCI or the organization changing its concept of OCI?

Techniques Used to Gather Salesperson Competitive Intelligence

Another interesting area for investigation is how might salespeople most effectively go about gathering information that may become SCI and are there any significant differences in the usefulness of SCI based on how it was gathered? For example, social media is having a great deal of influence on a number of marketing functions. It is likely that these communication platforms (e.g., Twitter, Facebook, corporate blogs) might be a useful source of competitive information. Yet the question is, do they provide useful information in terms of the quantity or quality of information gathered? In addition, there may be differences in the techniques used in a sales call (e.g., type of questioning) to gather CI that result in differences in the quality of SCI gathered.

Use of Salesperson Competitive Intelligence

While we present SCI as for the most part having positive effects, there remains the possibility that under certain conditions a salesperson may choose not to utilize certain pieces of SCI in a sales call. For example, salespeople may be less willing to share SCI with a new or potentially new customer until they can get a feel for how likely it is that contact can be trusted not to share that information with competing salespeople. As mentioned, SCI has a finite time frame in which it can effectively be used. Sharing it with those who will then quickly pass it along can significantly reduce the time within which it can be used. It may also be that the stage of the buying process may affect when SCI will be used. Perhaps earlier in the buying process a salesperson may withhold critical SCI in the hopes of using it more effectively later. Of course, it may be that using SCI earlier in the process can help to preclude the serious evaluation of products/services being offered by competitors. Finally, salespeople may withhold the use of SCI depending on the role a particular person plays in the buying center.

Link to Performance

We are making the assumption that the effective use of SCI will lead to better performance outcomes for the salesperson and eventually for the organization, but these contentions should be tested empirically. Not only should direct relationships be tested, but research should also investigate the possibility of nonlinear relationships between SCI and performance. In addition, it might be that there is an optimal relationship between gathering and using SCI and performance. In other words, it might be possible that too much time is spent on gathering information and not enough on using it. Finally, what about the proposed link between the use of SCI and the eventual impact on the organization? We believe that

individual success, particularly of salespeople, will result in organizational success, but there may be contingent factors that either accentuate or attenuate that relationship.

NOTES

1. The authors thank an anonymous reviewer for this suggestion.
2. The authors thank the reviewers for their suggestions related to this section of the paper.

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