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Meeting Mode Effects On Quality And Effectiveness With Clients And Sales Teams Utilizing Consumer Idealized Design

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MEETING MODE EFFECTS ON QUALITY AND EFFECTIVENESS WITH CLIENTS AND SALES TEAMS UTILIZING CONSUMER IDEALIZED DESIGN

by

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ABSTRACT

This dissertation examined the meeting mode effects on quality and effectiveness with clients and sales teams utilizing a systems approach called Consumer Idealized Design. A mixed method of research model was deployed with qualitative Consumer Idealized Design meetings between two groups, a sales team consisting of 20 people and clients consisting of 19 people. Quantitative data analysis showed that the clients perceived higher meeting quality and effectiveness when meeting virtually versus face-to-face. The sales team perceived higher meeting quality when meeting face-to-face but increased effectiveness when the meeting was done virtually. When applying a system method utilizing the Consumer Idealized Design process to design the ideal meeting mode, both the sales teams and client teams designed a hybrid meeting model that included face-to-face and virtual meetings as the most effective and highest quality meeting mode. Theoretical and practical implications of the research are discussed.

DEDICATION

I dedicate this proposal to my beautiful wife Lori whose love supported me through my journey. I also dedicate the proposal to my handsome sons Kristoffer and Matthew, whose character, integrity and hardworking independence inspire me every day.

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Table of Contents

LIST OF FIGURES

LIST OF TABLES

CHAPTER 1

INTRODUCTION

Background

Zoom, Skype, and Microsoft Teams are just some of the technology platforms we are using today at school, work, and for socializing. Some argued more than 20 years ago that technology has even replaced the office, including what was euphemistically referred to as the "paperless office" (Davenport & Pearlson, 1998). The critical questions now under study include how and what it may mean for today's 21st-century workforce and workplace. Because of virtual meeting technology, understanding the impacts and what the gaps and patterns are for effectiveness is critical to implementing efficient plans between sales teams and clients. De Guina et al. (2012) argue that research has determined virtual teams tend to develop effective interactions and norms more slowly, but they do often reach the level of effectiveness of face-to-face teams. A review of relevant literature has not been able to determine whether consumer product sales teams act similarly.

As a Regional Sales Manager at a Fortune 500 consumer products company, I manage the sales team and build relationships with our customers. Traditionally, face-to-face meetings with key stakeholders have been held at the customer corporate headquarters in large glass buildings with big boardroom offices at a fairly significant cost and time, but due to COVID-19 meetings are now being held as virtual meetings. In consumer product sales building, the relationships between the sales teams and client teams are a critical success factor. This shift in channel or mode of interaction suggests a research question: Simply put, does the relationship between the customer (retailer/client) and salesperson in consumer product sales make a difference in terms of (effective, efficient, quality, and engaging) sales outcomes? In consumer

product sales, it is important to understand if a change in meeting mode will have an impact because it is the responsibility of the sales team to develop annual marketing plans with the retailer to achieve mutual objectives on sales and profits.

Significance of the Study

Understanding both the gaps and challenges in meeting effectiveness and quality of engagement when moving from face-to-face to virtual between consumer product sales team and client's team may influence opportunities when developing and executing strategic plans. Related research questions are: Should marketing plans in consumer product change with the channel or mode of the meeting relationship? For example, clients are telling me virtual meetings work well when reviewing data, but not when reviewing new items, packaging, and merchandising concepts. In fact, they say nothing is better than walking the store to see the opportunities firsthand versus the Nielsen quantitative data points presented between the customer and salesperson.

Will these changes in sales and marketing affect the outcomes for consumer product sales? In the consumer product industry, researching what is factoring the most effective mode of communication between sales teams and clients will identify gaps and patterns to create new ways to market. However, key to identifying these patterns and gaps the research in my opinion will need to be through a systems-thinking lens to step back and see and learn as much from the key stakeholders via a Consumer Idealized Design and quantitative process. For example, a survey from a salesperson may say they perceive face to face as of higher quality and effectiveness. However, through system thinking, we may uncover reasons the salesperson favors face-to-face meetings, perhaps, for example, the travel and bonus points and nothing to do with the meeting quality and effectiveness.

Meeting format and communicative methods, including communicative styles, the literature has shown, impact the communication, learning, and by extension, the sales process. And so, meeting format and communication that is remote or face-to-face brings with it significant challenges, opportunities, and downsides. Engaging in non-verbal communication which includes effectively understanding and appreciating intention and interests via a broad set of facial expressions, gestures, paralinguistics such as loudness or tone of voice, body language, proxemics or personal space, eye gaze, haptics (touch), appearance, and artifacts are part of face-to-face experiences. When one party sends or receives mixed signals, trust may be violated which can damage the relationship (Breuer, 2016) and for the consumer product sales experience, may reduce the outcome. Trust can be created in a relationship by sending nonverbal clues that match your words.

A common belief is that 55% of body language works in our interactive communication (Phutela, 2015). Importantly in this inquiry is the question, "what degree does trust develop and support the consumer product sales experience and outcomes when the meeting of interaction changes from face to face to virtual?" The dissertation research process will evaluate and define key meeting descriptions that define meeting effectiveness and meeting quality from peer literature reviews. For example, for meeting quality the literature review revealed that trust is an important description and for meeting effectiveness pre-meeting preparation is an important description that the research will measure.

My experience with over twenty-five years working in sales and marketing roles with Fortune 500 companies has included many face-to-face meetings, building relationships by having intimate dinner meetings, market tours, golf outings, and strategic joint volume planning meetings with the customers and key stakeholders which have been curtailed due to the COVID

pandemic. As we move the mode of the meetings to virtual, is this what the customer wants, or is it what my company is mandating? Is the competition meeting face-to-face because they can? What is in the mindset of the sales team and client team to deliver the meeting and develop the relationship to build market share and competitive advantage. A key question that arises is, "what cost does this limitation exact on the sales process?"

The challenge is that many goals have been accomplished on the golf course or at dinner with the client or discussing strategy after a few beers, cocktails, or while sipping coffee after a great day face-to-face. Do the consumer product sales experiences and outcomes decrease when the channel or mode of interaction for social/cultural activities, such as playing golf and dining in restaurants and meeting at the store, changes from face-to-face to virtual? The dissertation research objectives are to get into the mindset of the client and salesperson and learn what they really feel are key to effective and quality meetings, looking at the days without the fun dinners and moving virtual to now coming out of the pandemic and planning dinner meetings. With the pandemic on the wane, companies such as Campbell's are reinstituting face-to-face meetings. Is this necessary and enough for a successful sales process, and if not, what can work as a substitute?

Due to limitations of time, scope, and scale, my dissertation will examine the impact of client and sales team meeting quality and the effectiveness (in terms of a set of outcome criteria) moving from face-to-face to virtual sales for consumer products. Research will uncover new meeting mode designs for the ideal meeting face-to-face and virtual that will return the high quality and effectiveness between the client and sales teams. The dissertation will both glimpse the phenomena associated with virtual versus face-to-face and as such enable corporate sales and

marketers to develop action plans to understand gaps and then create strategy, action plans, and practices for meeting improvement for both the sales team group and client groups.

General Research Question

Does meeting modality impact the quality, effectiveness, and desired outcomes of sales team/client interaction?

Problem

Because of COVID-19, consumer product sales teams moved meetings from face-to-face to virtual. As COVID-19 subsides and assuming other variants don't impede a return to face to face, companies once interacting with their customers and clients in this way, having gone to virtual meetings during COVID-19, are now able to assess and understand the impacts of virtual or remote interactions from face to face. Which is better? Face-to-face? Remote? A combination of both? "Creating their futures," as systems-thinking pioneer Russ Ackoff urges organizations to always hold primary in their interactive planning process, can be applied here as COVID-19 among other factors, contributes to the strategic leadership challenges of leading in a VUCA world. In a world of Volatility, Complexity, Ambiguity and Uncertainty requires organizations and individuals to adapt as well. Understanding meeting effectiveness and quality and designing an ideal format are critical to unlocking opportunities and executing strategic plans. As the pandemic moves to endemic and as safe face-to-face meetings can resume, is it worthwhile from a financial, meeting effectiveness, and sales outcome perspective to remain in the virtual channel? If this is to continue, what redesign of the client meeting process may be appropriate?

CHAPTER 2

LITERATURE REVIEW

Since COVID-19 arrived, most salespeople/client meetings have been conducted in a

virtual environment. The days of dinner meetings with clients and trade shows quickly ended as

conference calls and virtual meetings replaced face-to-face meetings and business-related

outings. This year, 2021, witnessed the birth of virtual trade shows. This raises a number of

questions. Can sales teams and clients interact as efficiently in the virtual world as they could

face to face? Are face-to-face meetings necessary to develop trust with the team? Now that

virtual meetings are a reality, it is important to examine existing literature about the viability of

such meetings and their effect on workplace performance. Recent meta-analysis has shown that

team trust is positively related to the team's attitudes and information processing with the team

(Huffmeir, 2019). According to Brevard (2016), team trust matters more in virtual meetings as

compared to face-to-face teams, reflecting the uncertainty and risks under the conditions of

electronic communication.

Meeting Effectiveness

Researchers were examining the value of meetings well prior to the current pandemic.

Early research on the value of meetings found that, although some meetings are effective, many

others are not and are viewed as ''notorious time-wasters'' (Sisco, 1993, p. 63). Individual views

about meeting effectiveness are manifestly important within organizations, as they have the

potential to affect attendance at meetings, behavior in meetings, and the ability of meetings to

achieve their goals (Bennett, 1998). For example, a study by Rogleberg et al. (2006) found that

employees measure a meeting's value by what is accomplished during the gathering in relation to

whether it disrupts other, more productive work. Moreover, employee perception of meetings

shapes how willing they are to engage seriously during those meetings and the degree to which goals are accomplished (Cohen et al., 2011).

A study by Leach et al. (2009) investigated the correlation between meeting design and perceived effectiveness. Using extensive online surveys, the authors sought to understand what distinguished valuable meetings from meetings broadly considered a waste of time. Their findings highlighted three criteria for an effective meeting. First, a written agenda distributed in advance and adhered to during the meeting which reflects "good meeting management, being perceived as a good use of time" (Leach et al., 2009, p. 75). Second, respondents indicated that meetings were more productive when held in a suitable venue such as a large conference room or another appropriate setting (Leach et al., 2009). Last, according to Leach et al. (2009) was attendee participation. Survey responses showed a strong correlation between whether meeting attendees felt they were allowed to engage during the gathering and their perception of its effectiveness.

Cohen et al. (2011) further examined the relevance of meeting design in how employees assess their overall value. While many of their findings validated those of Leach et al. (2009), Cohen et al. arrived at a more tailored set of recommendations. They stressed the importance of inviting only relevant personnel "central to the meeting's purpose" rather than including large numbers of employees who may or may not need to be present (Cohen et al., 2011, p. 10). Additionally, according to Cohen et al. (2011), those conducting the meeting should ensure that all necessary preparations are made. Aside from selecting an appropriate space, they should check the temperature and lighting in the room and confirm that any required technology is already in place. Advanced preparation should also include ordering food and beverages for the participants if the meeting's timing and length make that necessary (Cohen et al., 2011). Finally,

Cohen et al. (2011) stress the importance of ending meetings by the predetermined time so participants are not distracted by concern that they are not completing other tasks.

One notable distinction in the perceived value of meetings is highlighted by Geimer et al. (2015). Their research found that there is often a gap in the perceived value of meetings between attendees and leaders (Geimer et al., 2015). In their study, respondents generally recognized the importance of meetings for conducting various types of organizational business. When those surveyed dismissed the value of meetings, it was usually a result of "poor planning, lack of an agenda, and content of low relevance to attendees' work" (Geimer et al., 2015, pp. 2022, 2023). Moreover, employees who attended meetings during which they felt that their input was ignored were much more likely to question the usefulness of frequent workplace meetings in general (Geimer et al., 2015).

Yoerger, Crowe, and Allen (2015) discussed another important component of meaningful meetings. The researchers sought feedback from participants in meetings of varied sizes and lengths in an attempt to highlight what factor made participants feel like meeting time was time well spent. Using surveys and interviews, Yoerger, Crowe, and Allen (2015) measured how participation in decision making (PDM) shaped attitudes toward meetings and the degree to which respondents saw meetings as having a discernable positive impact in their workplaces. They found that, in workplaces where meetings are held sparingly and "when employees participate as a result of their own volition or encouragement that may come from the meeting leader," the result can be that "employees are more likely to go above and beyond in the performance of their duties" (Yoerger, Crowe, & Allen, 2015, pp.73, 74).

A more recent study by Mroz et al. (2018) opens with the premise that workplace meetings should occur only when absolutely necessary. The authors assert that "meetings can

serve to derail individual and organizational effectiveness and well-being by demanding too much of employees' time, sometimes for little or no benefit" (Mroz et al., 2018, p. 484). When meetings are necessary, Mroz et al. (2018) argue, inviting critical personnel who will make meaningful contributions and ensuring that the meeting agenda is circulated beforehand and adhered to rigorously during the meeting are vital to productivity. One other key component often overlooked in assessing meeting effectiveness is follow-up. Mroz et al. (2018) found that when meeting leaders check in with attendees regarding meeting substance and outcomes, the meetings themselves are viewed as more useful.

Though much of the focus on meeting efficacy is based in the business world, meetings are a common part of workplace culture in all professional settings. Molaro (2019), who approaches the subject from the standpoint of library and museum sciences, echoed many of the same conclusions as previous authors while adding a few important points about what makes an effective meeting. He reiterates the importance that researchers have placed in the past decade on selective decision-making as to whether or not a meeting is truly necessary. When meetings are necessary, Molaro (2019) argues that they must be task and outcome-oriented. "Meeting effectiveness is improved when meetings are centered or grounded in actions" (Molaro, 2019, p. 6). Moreover, based on his research, structure and boundaries are vital. Effective meeting protocols, distributing an agenda, assigning tasks, beginning on time, staying on-topic, and concluding with clearly-delegated tasks for follow-up, are what differentiate useful meetings from those that waste time and resources. (Molaro, 2019).

What is evident from the body of work discussed above is that scholars have devoted much time in the past 30 years to investigating the value of meetings. This select review of those studies reveals several points of overlap. Researchers are in broad agreement that meetings

should have pre-set agendas and that participants should have access to those agendas prior to the gathering itself. Once a meeting is convened, it is important to stick to the agenda, avoid getting sidetracked, and ensure it ends at the appointed time. Moreover, meeting planners should vet the list of attendees, inviting only personnel who need to be present. It is also vital that meeting participants feel invested in the proceedings. When employees perceive meetings as a one-way street in which their opinions and feedback are not listened to, they are much less likely to be engaged or see the purpose in interrupting their workday to sit through a meeting. With COVID-19 reshaping the workplace, meetings have gone virtual. However, virtual meetings were around well before the pandemic started.

Meeting Quality

A study conducted by the IMEX Group in partnership with Meetology® designed a test with questions including, "do face-to-face meetings improve creativity compared to a virtual meeting?" The results showed that face-to-face sessions generated more ideas, and "marginally" higher quality ideas, and a greater variety of ideas than virtual meetings (Matt Alderton 2013). How much time do we think about the quality of meetings and platform? At the execution level, the effective and efficient flow of information across the organization is the most critical determinant of success and scalability. Time spent on meetings, what are the ultimate goals of effective and efficient structured inflow is the Right Meeting Inventory, The Right Meeting Agenda, The Right Meeting Outputs, and Interim Communication.

Right Meeting Inventory - Who is the meeting with and how often.

Right Meeting Agenda - What do you hope to get out of the meetings. Overarching strategic themes transcend initiatives, departments, and phases of aggregate development.

Right Meeting Outputs - Four-week look-ahead plan, amplify the value created by wins, Track celebrate and reward along the way.

Interim Check-Ins - which will reduce meeting fatigue (Roy Bejarano Co-Founder & CEO of Scale Physician Group 2019).

Participants' evaluation of meeting quality is an important criterion variable for several reasons. As noted by Ajzen and Fishbein (1980), how we perceive our environment helps us form attitudes toward that environment, which in turn affects how we think about and behave in that environment now and in the future. It follows that how employees perceive meetings can have important attitudinal and behavioral implications as well. Such perceptions impact how current and future meetings are viewed, used and supported, and can ultimately impact a meeting's ability to accomplish its goals. For example, negative meeting perceptions may lead attendants to have pessimistic attitudes toward meetings, avoid meetings, undermine and not support meeting outcomes, or behave dysfunctionally in meetings (Bennett, 1998). Therefore, providing meeting attendees with a more positive meeting experience may have a lasting impact beyond the meeting at hand. For example, research has found that employee meeting satisfaction is an important predictor of employee job satisfaction (Rogelberg, Allen, Shanock, Scott, & Rogelberg, Scott & Shuffler, 2010). Furthermore, many employees publicly state strong negative feelings about meetings (Rogelberg, Scott, & Kello, 2007).

Research has also examined participation engagement and multitasking behavior during virtual meetings. Participants found lower motivation to engage both behaviorally and cognitively when participants were in a meeting remotely versus face-to-face. Also noticed was that turning the video on or off was a critical signal on engagement, with the camera on signaling high engagement and the camera off indicating low engagement. Almost 30% of virtual meetings

include multitasking and more likely multitasking is happening when the video camera and audio are turned off (Karl, 2021).

According to James Ward, customers are satisfied only if their requirements are constantly met. The only quality that really matters is the customer's perception of quality (Ward, 1994).

Meetings in the Virtual Space

One early study of virtual meetings was conducted in 2001 by Lantz. Her research focused on group tasks that must be completed jointly and how group members interacting electronically affect productivity. Referring to the virtual workspace as the Collaborative Virtual Environment (CVE), Lantz (2001) examined how communications between employees can suffer when it relies entirely on an electronic interface. She prefaced her study by noting that "face-to-face meetings are very important initially in a new group," in order to establish rapport among the members (Lantz, 2001, p. 111, 112). For groups working in a CVE for the first time, Lantz (2001) found that participants tended to get distracted by the technology itself and felt little was accomplished in meetings. However, when groups were given the proper tools, a meeting platform that was easy to understand and navigate, and time prior to the meeting to learn the technology, respondents found that virtual meetings could be productive (Lantz, 2001).

At the time of Lantz's study, much of the technology required for virtual collaboration was relatively new. Within a few years, however, many organizations were utilizing virtual spaces for meetings and team projects. Writing in 2008, Bergiel, Bergiel, and Balsmeier asserted that some elements required for successful team collaboration were the same as those needed for face-to-face cooperation; specifically, virtual teams required solid leadership, trust between members, good communication, and access to necessary technology. However, certain facets of

virtual collaboration are also unique to the virtual space. Working across time zones, language and cultural disconnects, and difficulties with conflict resolution can all compromise the work of virtual teams (Bergiel, Bergiel, & Balsmeier, 2008). The last point is significant. According to Bergiel, Bergiel, and Balsmeier (2008), virtual team leaders must be proactive about checking in with team members and ensuring that no interpersonal problems arise, a task which, in a conventional office setting, could "come to the team leader's attention by the act of walking around the water cooler or via a casual conversation with a team member" (p. 105). In other words, leaders cannot neglect team member dynamics just because those members are not in the same physical space.

Another 2008 study, this one by Webster and Wong, compared virtual group collaboration with face-to-face collaboration at a time when technological options had matured considerably. Their primary focus was the sense of belonging that group members develop and the resulting trust that they feel for one another which is "pivotal to preventing geographical distance from leading to psychological distance" (Webster & Wong, 2008, p. 45). According to Webster and Wong (2008), groups composed of people who are geographically close together and who divide their meeting time between face-to-face and virtual showed higher levels of trust and better cooperation than groups made up of a mixture of local employees and those who participate entirely from a remote location.

The key to generating trust and cooperation among team members, particularly in a totally remote meeting format, was the clear delegation of tasks and expectations and for individual members to demonstrate that they are meeting those expectations (Webster & Wong, 2008). Equally important, according to Webster and Wong (2008), is team leadership that

maintains open lines of communication and keeps virtual collaborators on-task and focused on the project's end goal.

By 2010, virtual meetings and team projects were quite common, and scholars were looking more closely at how to assess whether working arrangements of this sort were productive. Schweitzer and Duxbury (2010) sought to fill this gap by examining "how can a team's degree of virtuality be defined and measured," and "the relationship between a team's degree of virtuality and its effectiveness" (p. 208). Unlike previous research of virtual teams, the authors of this study used surveys of employees who work virtually to arrive at their conclusions. Their key finding indicated that traditional measures of team performance and meeting value declined among those working entirely in the virtual space (Schweitzer & Duxbury, 2010). At the same time, they found that teams whose members chose to participate in virtual projects, rather than being assigned to do so, assessed virtual collaborations as more productive (Schweitzer & Duxbury, 2010). Schweitzer and Duxbury's (2010) recommendation was for businesses that foresee virtual work as a major part of future operations to begin training their workforce well in advance, rather than expecting employees to learn the technology on the fly while also carrying out their assigned tasks.

Another study from 2010, this one by Ahuja, examined how technologies themselves can shape employee attitudes toward virtual work and meetings. Ahuja's (2010) main research interest was in determining how team performance correlates with individual team members' level of comfort with the modes of communication used for virtual work. She notes that, for instance, "it is a myth that communicating in virtual teams is easier than in traditional teams. Nonverbal signs and body language, facial expressions are entirely absent in virtual teams" (Ahuja, 2010, p. 38). While team members may be able to exchange information across great

distances using virtual means, many of the traditional elements of interpersonal communication are lacking. At the same time, obstacles to seamless communication, notably language barriers between team members, are no less problematic in the virtual space (Ahuja, 2010). A particularly important finding was that employees who work from locations outside the actual workplace reported that communication between team members was scattered and lacked focus (Ahuja, 2010). Ahuja (2010) also indicated that virtual team productivity was highest when participants spoke the same language and did not struggle to sync up their meetings across time zones. In other words, even if the technology works, teams may still struggle to collaborate virtually if members do not feel able to communicate readily with one another.

Within the emerging digital workplace where employees no longer meet exclusively face-to-face, some researchers have questioned how virtual team members develop trust with one another. Breuer, Hüffmeier, and Hertel (2016) conducted a meta-analysis of existing studies to determine the correlation between team trust and team success. Among the questions the authors examined was the degree to which documentation of team interactions, records of emails, texts, calls, and video conferences, affects trust levels among team members. For example, are virtual team members more trusting of one another in situations where documentation of virtual interactions takes place?

Based upon their research, Breuer, Hüffmeier, and Hertel (2016) argue that the main drivers of trust among virtual team members are "significantly related with team satisfaction and perceived team cohesion" (p. 1157). Moreover, team trust was enhanced in cases where one person was responsible for feeding information to the team rather than multiple outside sources and in instances when assessments of team progress were based on subjective benchmarks (Breuer, Hüffmeier, & Hertel, 2016). In the final analysis, the authors proposed enhancing

documentation of team interactions so that team members have a greater degree of certainty about what they are being asked to do and that their input is being conveyed accurately, could eliminate the need for traditional team-building exercises in virtual settings (Breuer, Hüffmeier, & Hertel, 2016).

Employee confidence in digital workspaces was investigated by Alsharo, Gregg, and Ramirez (2017) who highlighted the importance of knowledge sharing as a means of building trust between virtual team members. This particular study, published roughly two decades after the emergence of virtual work, demonstrates how difficult it has been for employees, even those who have used modes of virtual communication for much of their careers, to evolve a high degree of comfort with collaborating entirely in a virtual setting. "The absence of observable behaviors, which members of traditional face-to-face teams rely upon to establish and maintain trust, makes building trust among virtual team members a complicated issue, increasing performance uncertainty" (Alsharo, Gregg, & Ramirez, 2017, p. 480). Examining survey responses, the authors found that study participants reported feeling a lack of trust toward fellow virtual team members in cases where there was no opportunity for periodic face-to-face interaction (Alsharo, Gregg, & Ramirez, 2017). However, according to Alsharo, Gregg, and Ramirez (2017), trust can be fostered when group members feel that information is being shared openly. Knowledge sharing, when team members feel confident that they have a full, complete understanding of relevant information and progress, can compensate greatly for the wariness virtual team members might feel toward collaborators whom they have never met in person (Alsharo, Gregg, & Ramirez, 2017).

With virtual collaboration established as a reality in so many workplaces and ample research indicating the importance of leadership, openness, and trust for the smooth functioning

of these teams, what other elements are important for success in digital workgroups? According to Maes and Weldy (2018), how a virtual team is assembled and the culture within which it operates is critical. One factor the authors believe is often overlooked is team composition. "In successful virtual teams, members have certain common attributes: good communication skills, a high level of emotional intelligence, resiliency, self-motivation, and a sensitivity to culture" (Maes & Weldy, 2018, p. 86). However, according to Maes and Weldy (2018), managers often assign personnel to virtual teams without taking stock of whether or not they are properly trained for it or if the chosen individuals have been properly trained to function cooperatively in a digital space. Moreover, there is a misconception among many organizational leaders that project-oriented teams should be packed with experts. In fact, Maes and Weldy (2018) argue, virtual teams, in particular, tend to be less productive and their work more cumbersome when there is overlapping expertise. Their recommendation is that organizations train employees in the sort of soft skills, specifically communication, that are the foundation of virtual team functions while also establishing well-defined policies for virtual team formation and interactions (Maes & Weldy, 2018).

The most in-depth study of virtual team performance to date was published in 2019 by Breuer et al. Based on interviews with 55 professionals from various fields, all of whom have extensive team experience, the researchers set out to identify definitive characteristics of trust among virtual team members. While their findings were extensive and revealed a host of qualities that team members value in one another, they arrived at one very significant overarching conclusion. In assessing their findings, Breuer et al. (2019) concluded that "most main factors of perceived trustworthiness include both task-related and team-related facets" (p. 23). In other words, the success of virtual teams depends not only on whether the members have

a rapport with one another, nor does it hinge entirely on individual members' perceptions of how well other members accomplish their assigned tasks; both matter equally. According to Breuer et al. (2019), interviewees consistently indicated that virtual teams function optimally when members display strong collegial dynamics and each member reliably and consistently carries out his/her assigned tasks punctually and professionally.

The sources discussed above focus on how virtual teams function. What can be gleaned from these works is that many of the things which were important in face-to-face meetings are still important even as meetings have shifted to the digital space. Employees still need to be able to communicate clearly and effectively with each other. They still need to be able to trust one another. Good leadership is no less important in the virtual space than it was in the traditional workplace.

Setting tasks and assuring that the right people are included can make the difference between a useful cooperative work arrangement and one that accomplishes very little. Let us turn our attention now to the arena of sales and examine how virtual teamwork and meetings are affecting interactions between salespeople and clients.

Sales Team in the Virtual Space

The emergence of Covid-19 in early 2020 and the resulting lockdowns that were put in place around the world altered the business landscape drastically. Working remotely became a necessity, rather than an option. As companies scrambled to get their workforces outfitted to function entirely in the virtual space, sectors that traditionally rely mostly on face-to-face interactions with clients had to chart a new path forward. Nearly two years into the pandemic, researchers are gathering preliminary data on the mass transition to remote work. One study by Dubey and Tripathi (2020) used social media to quantify how remote employees feel about

working from home and found that roughly 60% felt it was a largely positive arrangement. Another study by Park, Jeong, and Chai (2020) found a correlation between whether employees felt adequately supported and valued and their degree of satisfaction with remote work. Undoubtedly, there will be a great deal more research into this topic moving forward. One aspect of business that will certainly receive scholarly attention is how virtual meetings and remote work impact the success of sales and sales teams.

As the pandemic moves to endemic, businesses will need to reassess the value of remote work. Is it worthwhile from a financial, meeting effectiveness, and sales outcome perspective to remain in the virtual channel? Which is better? Face-to-face? Remote? A combination of both? Within the realm of sales, one question will dominate above all others. Does meeting modality impact the quality, effectiveness, and desired outcomes of sales team/client interaction? Many elements weigh on the outcome of interactions between clients and salespeople. For example, a study by Crosno, Dahlstrom, and Friend (2020) found that the relationship between buyers and sellers is often shaped by the degree to which buyers perceive sellers as being motivated by opportunism. If a buyer senses that a seller is looking for an opportunity to increase prices covertly, that buyer is less likely to consider the seller's needs when negotiating a price. Much of what buyers and salespeople perceive in one another derives from direct interactions and presently, direct interactions between salespeople and clients are conducted mostly in virtual spaces. However, only a small number of studies have assessed the impact of virtual meetings on salesperson/client relations.

The earliest study examining virtual sales teams specifically was conducted by Kirkman et al. in 2004. Assessing 35 sales teams that transitioned to virtual sales from traditional face-to-face sales, the researchers wanted to establish whether technology was impeding interactions

with clients. One of their key findings, which may seem obvious now but might not have been in 2004, was that technology and proper tech support are crucial (Kirkman et al., 2004). Virtual teams that must rely on tenuous connections with one another cannot be expected to meet sales goals if their communication with clients is prone to disruption. Moreover, faulty technology can actually drive clients away or make them question whether the salesperson's organization can live up to its commitments (Kirkman et al. 2004). Their more notable finding, however, was that properly led virtual sales teams can flourish beyond expectations.

To this end, "it is important that team members collectively feel enabled to improve processes and respond to changing customer demands, often coming up with creative solutions to resolve problems and emergency situations" (Kirkman et al., 2004, p. 185). When virtual salespeople are entrusted with greater autonomy, the sense of empowerment they feel is likely to make them more dedicated and driven, and therefore more successful. As such, it is important to consider what proper leadership looks like in the world of virtual sales.

Rapp et al. (2010) took up that question, investigating how best to manage a virtual sales force. The authors' central goal was to illustrate whether or not the relative experience of virtual team members, teams made up of people with a strong background in virtual sales, did or did not correlate with sales performance based on management style (Rapp et al., 2010). What they found was that highly experienced sales teams, as one would expect, require less direct managerial oversight and direction and "prefer to skip the planning processes and engage directly in work-related activities" (Rapp et al., 2010, p. 221). In those cases, Rapp et al. (2010) recommend that team managers limit themselves to targeted interventions and small course corrections based on their observations of the strengths and weaknesses of individual team members. On the flip side, the authors found that managers supervising inexperienced virtual

sales teams needed to focus most of their effort on planning and regimenting employee tasks (Rapp et al., 2010). The key, in the final analysis, is that team managers know their personnel and moderate their leadership style accordingly.

Badrinarayanan, Madhavaram, and Granot (2011) performed one of the first deep assessments of how the virtual medium affects sales. Examining global virtual sales teams (GVSTs), they sought to define the characteristics of how these entities function and how they should function. One thing they discovered was that the composition of sales teams and the specialties of the individuals chosen to be part of them matters greatly (Badrinarayanan, Madhavaram, & Granot, 2011). Another important element is the type of training provided to members of virtual sales teams who will interact with clients around the world. Specifically, the authors argue that businesses should ensure that GVST members possess cultural awareness and are attentive to the differences between themselves and clients (Badrinarayanan, Madhavaram, & Granot, 2011). What the authors found was most critical to the success of virtual sales teams is unfettered access to the technology needed to ensure seamless communication with clients. Companies specializing in global sales must spare no expense in "offering access to technologies that enable GVSTs to overcome global sales challenges and achieve targeted outcomes" (Badrinarayanan, Madhavaram, & Granot, 2011, p. 321).

The most up-to-date examination of virtual sales teams is Rapp and Rapp's 2021 assessment of how things have changed over the past decade amidst the growth of companies and updates in technology. Most significant according to the authors, is that virtual sales teams have become true teams, operating in concert opposite teams of buyers (Rapp & Rapp, 2021). A common practice in earlier years was for virtual sales teams to work together coordinating the various aspects of the sales process, but for a single person to deal directly with the client. "The

result was an imbalance in the sales equation – with buying teams on the buying side and individual salespeople on the selling side" (Rapp & Rapp, 2021, p. 1). The result is that clarity of communication and real-time coordination between team members is even more essential now. Their recommendations mirror those made by many of the authors outlined who discussed remote work in general. Rapp and Rapp (2021) stress the need to foster interpersonal dynamics between team members and for leaders to facilitate this process.

Choosing the right members for a virtual sales team is just as critical as selecting team members for any group working on a project remotely. They caution against including "lone wolves" on any virtual sales team, pointing out that while a tendency toward self-isolation and distance from fellow employees does not necessarily mitigate their value to the company, people of this sort can hamstring a collaborative undertaking like team sales (Rapp & Rapp, 2021). Given the growing prevalence of virtual work in general, and virtual sales in particular, the authors conclude that businesses wishing to enhance their virtual team prowess look for certain qualities during the hiring process. Specifically, in Rapp and Rapp's (2021) view, businesses should seek out self-starters and candidates who are team-oriented. If new salespeople are brought in because they embody these qualities, it will create an organization in which any employee can be recruited to a virtual sales team and contribute readily.

Few studies have examined the consumer food industry clients and sales team impact of moving meetings from face-to-face to virtual meetings, but many have explored virtual teams. The main objectives of this study are to understand how the client and sales teams perceive the impact of the meeting changes since COVID-19 and the effects on the key attributes of quality and effectiveness during meeting modes as well as defining what the idealized meeting design would be for sales teams and clients. I am confident the research will enable me to understand

how to be more effective as a manager and leader in my organization as well as inspire more

research opportunities on this topic.

CHAPTER 3

RESEARCH METHOD

Objectives

The objectives of this research are:

1. To understand the impacts, if any, on clients and sales team meetings moving from face-to-face to virtual meetings on a full-time basis.

2. To understand from both the client and sales team viewpoints the perceived impacts of the various factors moving meetings from face-to-face to virtual meetings.

For purposes of this study, the author set up two conception frameworks, "A" and "B" measuring and allotting values to both independent and dependent variables. "A" conceptual framework refers to a quantitative analysis of survey questions administered to sales team and clients on perceptions and attitudes about meeting quality and effectiveness at different meeting modes. "B" conceptual framework refers to the Customer Idealized Design study. This was a methodology in which sales and clients designed their ideal relationship of meeting mode if they could have any system they wanted. Customer Idealized Design is based on Russell Ackoff's pioneering approach to effecting fundamental, transformative change within an organization starts first with envisioning the ideal solution and then working backward to where the organization's current situation resides. In this study, the two principal stakeholders are the clients and sales teams, and they will be asked to design the ideal meeting mode (for example, face-to-face, virtual).

Conceptual Framework A

The conceptual framework for the quantitative research in Figure 1 illustrates this study's research design starting with the meeting mode type, face-to-face and virtual, testing the four hypotheses H1, H2, H3, and H4. For example, developing trust and requirements being met are just some of the attributes important to meeting quality and will be measured in the survey. For the other dependent variables meeting effectiveness, preparation, and achieving goals are examples of effectiveness attributes that are also being measured in the survey.

Figure 1: Research Methodology Quantitative Analysis Conceptual Framework Model

Conceptual Framework Model

- Development of trust and ideas shared (Breuer 2016)
- Meeting interruption and time demands (Rogelberg 2006)
- Requirements consistently met (Ward 1994)

Meeting Quality

Meeting Mode

H1 and H2

Face to Face vs Virtual Meetings

H3 and H4

- How and when to speak (Winter 2000)
- Pre-meeting preparation & Achieving work goals (Rogelberg 2006)

Meeting Effectiveness

Applying Quantitative Analysis to Research Questions Framework A

      H1 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting quality than virtual meetings.

      H2 face-to-face meetings result in higher <u>client</u> perceptions of meeting quality than virtual meetings.

      H3 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting effectiveness than virtual meetings.

      H4 face-to-face meetings result in higher <u>client</u> perceptions than virtual meetings.

Questionnaire Development

      The questionnaire will consist of ten or more questions. The sample size will be ten plus salespeople and ten plus clients. The questionnaire will be divided into two parts to measure the impact on meeting quality and effectiveness before and after COVID19. Survey scores will be a 7-point Likert scale to measure meeting quality and effectiveness. Survey question design and execution was be developed during class 706 in January 2021. Qualtrics survey tools were deployed.

Study Participants

      Ten salespeople located throughout the United States are included in the survey. Planning three salespeople in the Mid-West, four sales representatives in the North East, and three in the South East. The sales representatives live near the customers' office headquarters and in the past would meet the clients monthly. For example, the sales representative responsible for the Publix account lives near the Publix corporate headquarters in Florida.

Ten clients will also participate in the survey and are located throughout the United States. Three clients in the Mid-West, four clients in the North East, and three in the South East. The South East client would be Publix headquartered in Florida for example. As you can see the sample size will not be random in this case.

Statistical Tools Used

Quantitative analysis will be implemented in this research study. Because of the small sample size of two groups of ten, the T-Test statistical tool will be employed. The T-Test will analyze the mean scores between the independent variable meeting mode (Face to Face / Virtual) and the dependent variables meeting quality and effectiveness. I also plan to work closely with the Qualtrics team to help enhance the survey.

Qualitative - Consumer Idealized Design

When customers and clients are aware of what they want, do they really tell you? Customers and clients often attempt to provide answers the person asking the question wants to hear rather than ask for more information. One process that was developed by Russell L. Ackoff is a process called Consumer Idealized Design also known as CID (Ciccatelli, Magidson 2006). This process has been used to create innovative products and services. The CID process is fundamentally different from focus groups and engages with carefully selected groups.

In my research, the sales team and clients are the selected groups to participate in the CID process to create the "ideal" meeting mode (face to face or virtual) that increases meeting effectiveness and quality for clients and sales teams. The process of CID is similar to interactive planning; however, one major difference is that the interactive planning process brings in all key stakeholders from departments such as manufacturing, finance, and marketing to execute a process called Formulating the mess, Ends planning, Means planning, Design implementation,

and Design controls. Much of stakeholder theory has roots in the need to adopt a strategic approach in managing stakeholders' productivity (Freeman, 1994). CID process is less stakeholder-heavy and more customer-specific focused. The CID process is more specific to producing a product or service design with only specific groups. In my research, those specific groups are the sales team and client teams

The Consumer Idealized Design method will follow steps recommended from Dr. John Pourdenhad's work. The CID execution steps included preparing an intervention, creating a learning space, developing a "breakthrough" (Pourdenhad, Person, 2001).

In this CID research, the new "ideal" meeting mode design will have implications on the practitioner (sales team and clients) as well as implications on company policy that will be shared in the discussion.

Research Design

The CID research intervention meeting will be virtual with the sales team and client groups separately. The sales team group is made up of twenty account managers supporting my Campbells business responsibility located from the Mid-West to the East Coast of the United States. The sales team's roles and responsibilities are to meet with the clients monthly and review marketing programs, share consumer insights. new item innovation and merchandising strategies. The sales team is 45% male and 55% female with an estimated average sales experience of ten years. The sales team clients they manage have annual sales that range from $1 million to over $10 million. The client team group is made up of twenty key clients 36% male and 64% female with an average of ten years' experience who support the previse mentioned sales dollars and meet with the sales teams with the objective to learn about new items, market

insights, build strategic marketing programs and merchandising initiatives. The research process implemented in my study is an interpretivism approach.

Qualitative Research

The Consumer Idealized Design meeting research data will be captured during the intervention meeting with the groups and the goal would be to create the "Ideal" meeting mode with each group. To best present the objective during the intervention step to the teams, I will share a picture of a car representing the meeting and the car's steering wheel would represent the meeting mode. The sales teams and client teams would be asked to design the "Ideal" steering wheel (Meeting Mode) that would result in increased meeting quality and effectiveness (Figure 2). Also deployed during the meeting will be learning domes highlighting key descriptions on meeting quality and effectiveness from scholarly peer reviews. The learning domes will help inspire thought and support the objective and purpose of the design.

Meetings take place with the sales team in a virtual group setting for about ninety minutes, and the data are collected by individual sales teams' person's input on creating the new steering wheel (Meeting Mode). Meetings with the client team follow the same process but need to be held "one on one" due to the competitive dynamics of the clients. The client teams in this Consumer Idealized Design are also executed virtually and last sixty minutes. The data input during the intervention is logged and later disseminated using qualitative analysis tools that I will describe in the data action plan below. During the intervention, the goal will be to create the working space for the team to learn and create the "breakthrough" future meeting mode. I do see limitations to the meetings being held virtually versus face to face and see an opportunity for future research by having all the clients in a live setting as well as all the sales teams in a separate live setting during the Consumer Idealized Design intervention process.

Figure 2: "Ideal" Meeting Mode Illustrated

Meeting Quality Descriptions Learning Dome

- Develop Trust
- Meeting Interruptions
- Requirements Consistently Met
- Feeling Valued
- Responsiveness
- Reliability

Meeting Effectiveness Descriptions Learning Dome

- Pre-Meeting Preparation
- Achieve Work Goals
- Know How and When to Speak
- Start and End on Time
- How Quickly Understand and Diagnoses
- Meeting Agenda

Sales teams asked to best design the ideal meeting mode "steering wheel".

Clients asked to best design the ideal meeting mode "steering wheel".

Data Action Plan

After the Consumer Idealized Design meetings, each client and sales team attendees'

feedback data will be logged on what the Ideal Design meeting mode "Steering Wheel" will be

to increase meeting quality and effectiveness. The data will be captured from notes taken from the meetings and common themes will be coded and analyzed. For example, if the term 'virtual' is frequently used as a critical success factor, the wordle chart will increase the size of that specific term. I plan to load the data themes into Microsoft Excel charts and also test Atlas AI software analysis. Statistical pie charts and other descriptive statistics analyses will be completed for the findings chapter.

The goal of Consumer Idealized Design is to solicit ideas, create an appreciation for change, drive innovation and transform individual knowledge into organizational knowledge. This comprehensive knowledge of understanding what the client and sales teams believe is the ideal type of meeting mode and has the highest quality and effectiveness versus a study of desires. Consumer Idealized Design is effective because traditional quantitative research no longer works with the increasingly diverse and fickle customer base (Pourdehnad, Robinson 2001). I anticipate that the data will suggest a significant impact from the research findings on consumer product sales teams' and clients' meeting mode. The findings can be leveraged to close gaps in the sales team and clients that I manage. At the same time, the learnings will impact future policy on consumer product companies not only externally with clients but also internally with the company workgroups.

CHAPTER 4

RESULTS

COVID-19 moved consumer product sales team meetings with the clients from face-to-face to virtual. As COVID-19 subsides and we enter our second year of adapting to the pandemic and we return to face-to-face meetings between the sales team and clients, we are now able to assess and understand the impacts of virtual or remote interactions from face to face. Which is better? Face-to-face? Remote? A combination of both? "Creating their futures," as systems thinking pioneer Russ Ackoff urges organizations to always hold primary in their interactive planning process, can be applied here as COVID-19, among other factors, contributes to the strategic leadership challenges when leading and challenges in a VUCA world. In a world of Volatility, Complexity, Ambiguity and Uncertainty requires organizations and individuals to adapt as well. Understanding meeting effectiveness and quality and designing an ideal format are critical to unlocking opportunities and executing strategic plans. As the pandemic moves to endemic and as safe face-to-face meetings can resume, is it worthwhile from a financial, meeting effectiveness, and sales outcome perspective to remain in the virtual channel? If this is to continue, what redesign of the client meeting process may be appropriate?

The research question is, "Does meeting modality impact the quality, effectiveness, and desired outcomes of sales teams and client interaction?" The objectives of this study are to understand the impacts, if any, on clients and sales teams moving from face-to-face to virtual meetings. A mixed method study was deployed to understand the perceived impact of the various factors moving meetings from face-to-face to virtual on the sales teams and client teams.

The findings in this study will begin with qualitative analysis utilizing a consumer idealized design process that was executed by asking the sales teams and client teams to design the ideal meeting mode that would increase meeting effectiveness and quality. The consumer idealized design process was implemented with two groups, the sales team and clients. In this type of qualitative analysis, data were reported on the respondents' age ranges, sex, experience, and geographic location. Data were also reported on factors the groups shared on designing the ideal meeting mode. The qualitative data finding is reported with Wordle charts, actual quotes by respondents, and descriptive tables, charts, and graphs.

The quantitative research findings are from the Qualtrics survey sent to the sales teams and client teams to capture data from questions on meeting quality and effectiveness when face to face and virtual. For the quantitative analysis, the independent variable is the meeting mode and has two values (face-to-face and virtual) the dependent variable is meeting quality and effectiveness. For the quantitative research, a t-test was used to measure the results on four hypotheses questions to determine if statistically significant effects on meeting mode quality and effectiveness are found. The t-test finding charts are communicated in the reported statistics and a summary of the significance of the results

Following the quantitative and qualitative findings is a table of key factors and overlaps with both the quantitative and qualitative methods for later interpretation in the discussion chapter.

Qualitative Results

The sales team and the client teams were asked to design the ideal meeting mode with the greatest perceived meeting quality and effectiveness without any constraints. Data were collected from both the sales teams and the client teams (Figure 3). Both teams were presented with a picture of a car and a steering wheel (Figure 2). The car represented the meeting and the steering wheel represented the meeting mode. The teams were asked to design the "Ideal" steering wheel which was the meeting mode. Following are the data that were collected as a result of the consumer idealized design meetings.

Figure 3: Data Collected from Sales Team and Client Team

Data Collection Process

Data were collected from respondents via in-depth virtual meetings with the sales team as a group and one on one meetings with the client teams held over a series of two meetings. Collected data were organized in an Excel document (Appendix H, Appendix I).

Sales Team Demographics

The sales team was composed of 11 male respondents and 9 female respondents (Table 1). Respondents were not asked to state their specific age, however, an age range varying from approximately 40 years old to 60 years old was observed.

Table 1: Gender of Respondents - Sales Team

Gender of Participant	Number of Participants
Male	11
Female	9

Sales Team Geographic Locations

Respondents from the Sales Team were located in a total of 13 states across the United States, spanning from states in the northeast to Texas (Table 2).

Table 2: Geographic Locations of Respondents of the Sales Team by Gender

Location of Respondents (United States)	Male	Female
Florida	1	1
Georgia		1
Illinois		1
Maryland	1	
Massachusetts	2	
Michigan		1
Minnesota	3	1
New Jersey	1	
New York	1	1
North Carolina		1
Ohio		1
Pennsylvania	1	1
Texas		

Consumer Idealized Design Findings - Sales Team

As previously stated, in-depth Consumer Idealized Design data were collected from the sales team (Figure 4) as a group during virtual meetings.

Figure 4: Consumer Idealized Design Data - Sales Team

Analysis of the Consumer Idealized Design data collected from the Sales Team (Figure 4), revealed four trends. From the Sales Team Consumer Idealized Meeting process, it was observed that 55% of respondents reported favorably on a face-to-face model. A preference for a hybrid meeting model was reported by 25% of respondents. A model based on the customer's preference was expressed by 15% of respondents, and a virtual model was counted at 5% of the respondents (Figure 5).

Sales Team Trends

Figure 5: Design Data Trends - Sales Team

Sales Team

Virtual • Face To Face • Hybrid • Customer Request
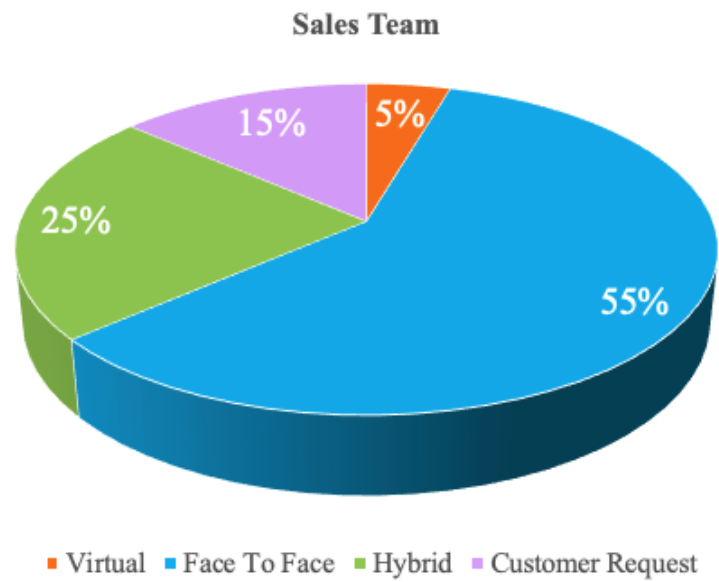
Sales Team Face-to-Face Design

When the sales team data were analyzed, nuances were observed in the design of the face-to-face model. The proportionality of those nuances is illustrated in Figure 6.

Figure 6: Sales Team Face-to-Face Design Considered Proportionately
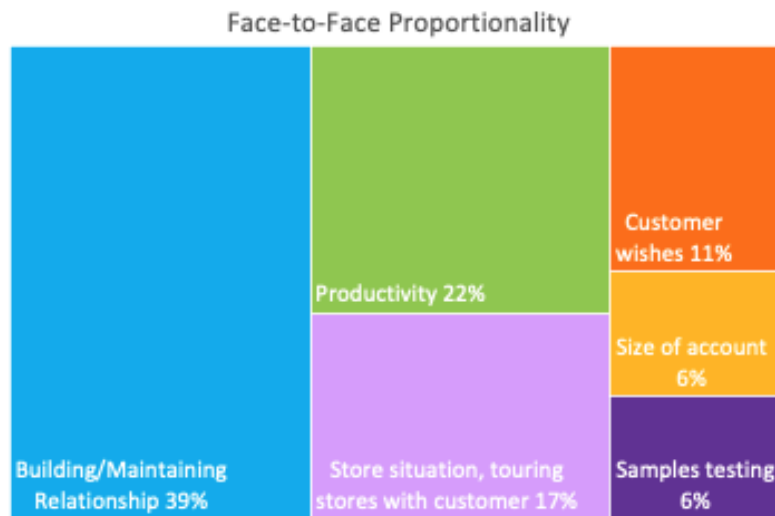
In fact, in 39% of the data analyzed from the respondents reporting a face-to-face model as a preferred design, the importance of building and maintaining relationships is noted as an important element of the design. To substantiate the claims of the sales team, below are direct quotations from the sales team regarding the preferred design; these quotations as well as the entirety of the answers of respondents on the sales team are reported in Appendix H.

Respondent S-R2 reported, "I feel face-to-face is more personal because you get the full attention and focus of the client."

The relationship component of the face-to-face meeting design is something that was spoken about in different ways.

According to Respondent S-R13, "Face-to-face eye contact is important to feel out the customer."

Productivity was represented by 22% of the data reported by these respondents as influencing their choice of a face-to-face model.

Respondent S-R6 stated, "In my area, face to face is still the best way to connect. I get more accomplished when I am there with the buyer."

Respondent S-R18 communicated that "face-to-face is more effective."

Of the data from the respondents reporting a design preference of face-to-face, 17% of these data reflected that the actual store situation was important to the choice of that design.

Respondent S-R16 said, "It's good to walk the stores with the buyer."

With the face-to-face model as their design preference, 11% of the data returned by these respondents mentioned that they would still have to take into consideration what their customers desired.

Respondent S-R9 stated, "I feel more comfortable with face-to-face, but it will depend on what the customer wishes."

Of the data analyzed from the face-to-face respondents, 6% of those data reported that they would base their preference on the size of an account.

Respondent S-R8 said, "If you are dealing with a local to small retailer, face to face is preferred, but with a headquarter customer they may require a virtual meeting design."

Product sample testing was considered as important to a face-to-face model by 6% of the face-to-face data that were analyzed.

According to Respondent S-R12, "samples testing needs to be face-to-face."

Sales Team Hybrid Design

From the Sales Team Consumer Idealized Meeting process, the hybrid model was identified as being preferred by 25% of the respondents. Of those designing the hybrid model, 2/3 of the respondents said that a good ratio for constructing the hybrid model would be 50% face-to-face meetings and 50% virtual meetings, while 1/3 said a ratio of 80% face-to-face meetings and 20% virtual meetings would be the best design (Figure 7).

Figure 7: Sales Team Hybrid Design Considered Proportionately
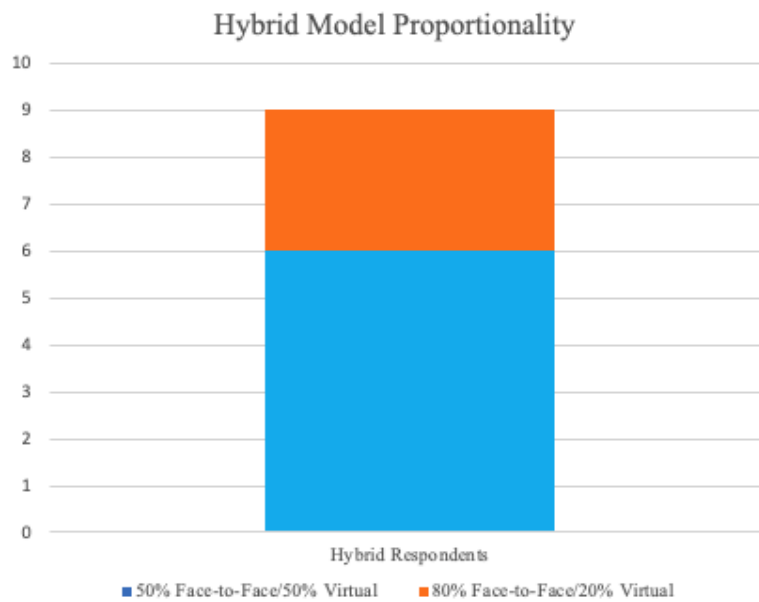
Respondent S-R14 said, "Hybrid is good with face-to-face 80%."

Respondent S-R1 commented, "I like hybrid; a 50/50 ratio of face-to-face with virtual works best."

Sales Team Customer-Driven Design

A customer-driven model was identified which 15% of respondents favored (Figure 8).

This meeting design would be predicated on what a salesperson's customer desired.

Figure 8: Customer Request Store Meetings Model
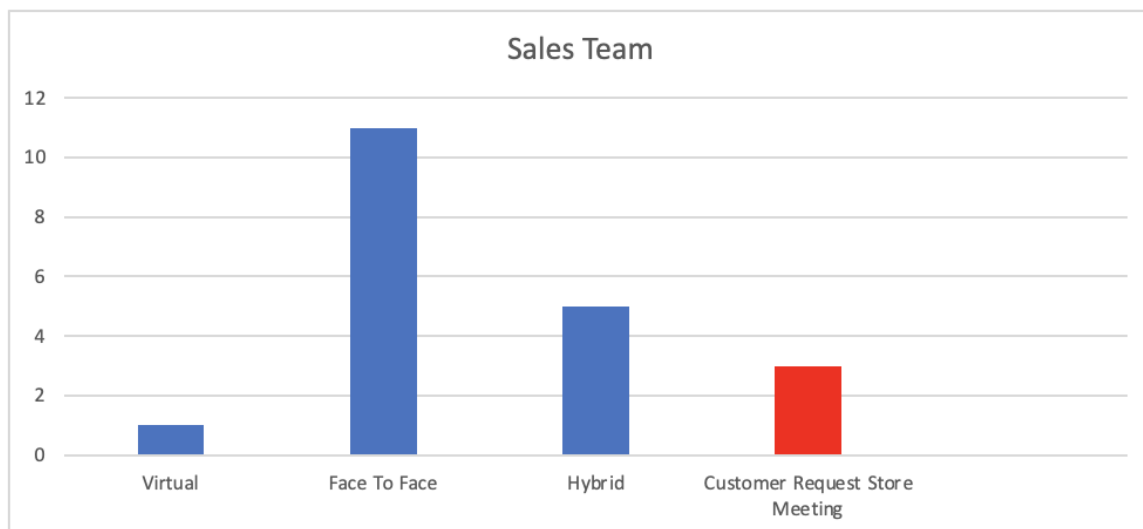
Respondent S-R9 reported that they "felt more comfortable with face-to-face, but the

model would depend on what the customer wishes."

Sales Team Virtual Design

A preferred virtual model was identified by 5% of the Sales Team participants. Three

main considerations were identified in the virtual design (Figure 9).

Figure 9: Main Components of Virtual Meeting Design Defined
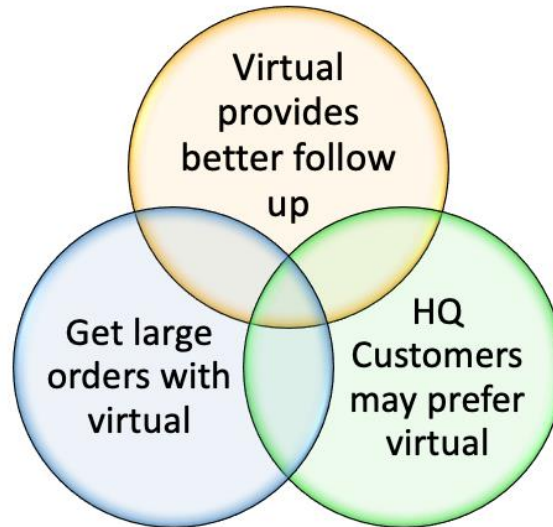
Respondent S-R7 asserted, "I am able to get big orders from virtual meetings."

Qualitative Analysis Consumer Idealized Design – Client Team

Data Collection Process

Data were collected from respondents via in-depth virtual meetings with the client team

held separately with each client (Appendix I). Data were organized in an Excel document.

Client Team Demographics

The client team was composed of 8 male respondents and 11 female respondents (Table

3). Respondents were not asked to state their specific age, however, an age range varying from

approximately 40 years old to 60 years old was observed.

Table 3: Gender of Respondents - Client Team

Gender of Participant	Number of Participants
Male	8
Female	11

Client Team Geographic Locations

Respondents in the Client Team were located in 10 different states across the United States (Table 4).

Table 4: Geographic Locations of Respondents of the Client Team by Gender

Location of Respondents (United States)	Male	Female
Illinois	1	2
Michigan	1	
Minnesota	2	3
New Jersey	1	
New York	1	1
North Carolina		1
Pennsylvania	1	2
Rhode Island		1
Texas	1	
Wisconsin		1

Consumer Idealized Design Findings of Client Team

Figure 10: Consumer Idealized Design Data - Client Team

Analysis of the Consumer Idealized Design data collected from the Client Team (Figure 10), revealed three trends (Figure 11). From the Client Team Consumer Idealized Meeting process, 37% of respondents reported favorably on a virtual model. A preference for a face-to-face meeting model was reported by 37% of respondents. A hybrid meeting design was reported by 26% of the respondents.

Client Team Trends

Figure 11: Client Sales Team Design Data Trends
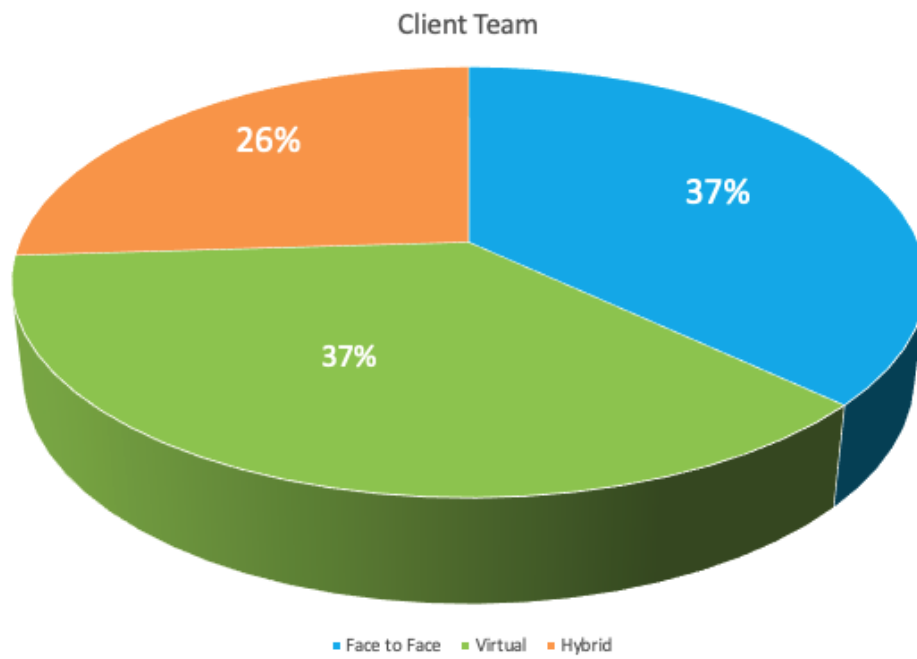
The client team design resulted in 37% of respondents preferring a virtual design, 37% stating they liked a face-to-face design, and 26% specifying a hybrid design.

Client Team Virtual Design

Figure 12: Client Team Virtual Design Considered Proportionately
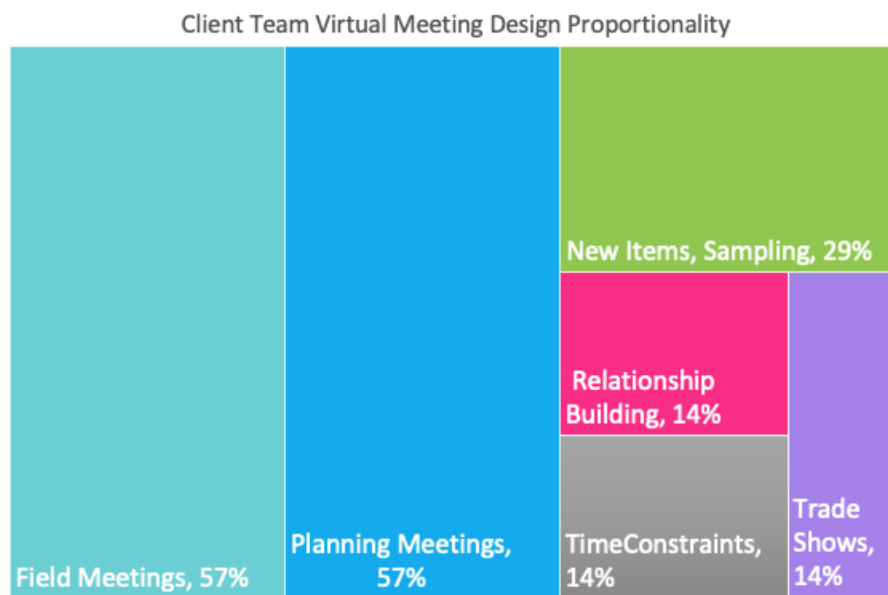
There were nuances in the responses of the Client Team who preferred a virtual meeting design (Figure 12). For example, 57% spoke of the importance of having planning meetings virtually. To substantiate the claims of the client team, below are some direct quotations from the client team regarding the preferred design; these quotations as well as the entirety of the answers of respondents on the client team are reported in Appendix I.

Respondent C-R6 stated that "Key planning meetings should be virtual."

Respondent C-R7 said that "I like virtual meetings because it's easier for planning, and you can bring a lot of people into the meeting."

The Client Team respondents who preferred a virtual meeting design pointed out that although they would prefer a virtual meeting design, there were instances when they would

consider incorporating face-to-face meetings for store-level meetings. For example, 57% of the respondents who preferred a virtual meeting design said the importance of field meetings needed to be considered.

Respondent C-R1 stated, "A virtual meeting design is more effective, but I'm willing to have store-level meetings also."

Respondent C-R3 said, "I think virtual works best, but it is productive to meet sales reps at store level, so I'm willing to do that."

Another consideration mentioned by the Client Team respondents who preferred a virtual meeting design were new items and sampling, mentioned by 29% of the virtual team respondents.

Respondent C-R7 said, "Virtual is preferred, but for presenting new items, face to face is best."

Relationship building was a component mentioned by 14%. Of the respondents who preferred a virtual meeting design, 14% of them said relationship building was better when using a face-to-face meeting design.

Respondent C-R4 said that they preferred a virtual design but gave an example of relationship building, "Having dinner with a sales representative for sampling new items built our relationship, so I am open to some face-to-face meetings."

Of the data from the respondents reporting a preference for a virtual design, 14% of these data reflected that trade shows should be held in person.

Respondent C-R11 preferred a virtual design but said that "face-to-face works best at trade shows."

Some 14% of respondents mentioned time constraints when designing a virtual meeting.

Respondent C-R12 said, "I don't have time to meet face to face with small vendors. I prefer virtual, but I'm willing to meet face to face with a rep that has larger sales volume."

Client Team Face-to-Face Design

Figure 13: Client Team Face-to-Face Design Considered Proportionately
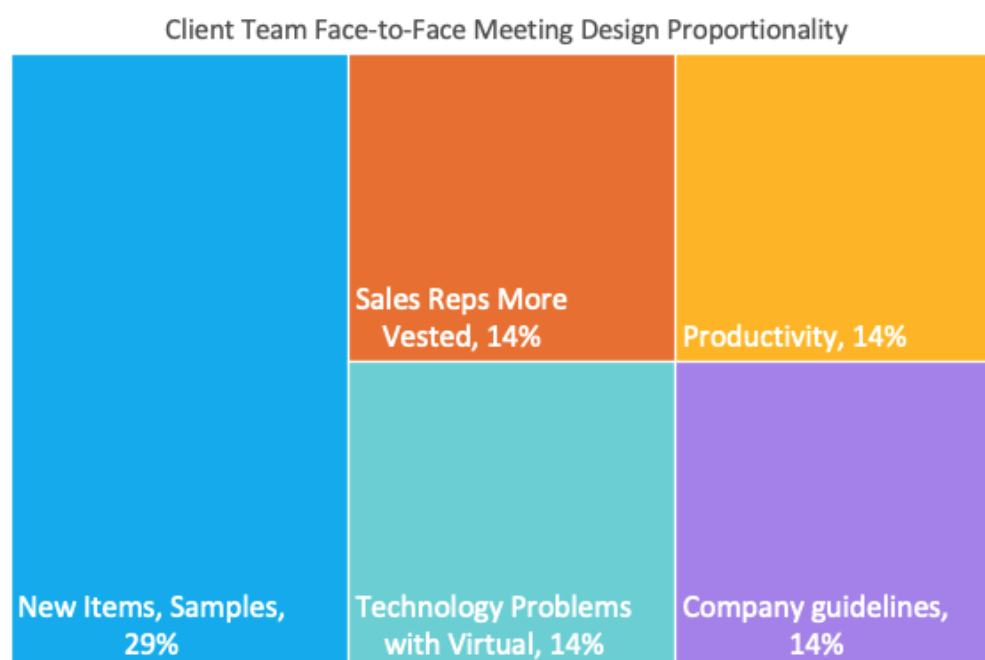
As previously illustrated in Figure 11, the percentage of client team respondents who identified a preferred face-to-face meeting design was 37%. When designing a face-to-face design, the data that emerged highlighted some different components that were considered with this design (Figure 13). For example, 29% of those that identified a face-to-face model specified that this model is best when introducing new items or samples.

Respondent C-R14, "Face to face is better because you get to share product and see new things."

With a face-to-face design sales representatives are more vested, according to 14% of those who preferred a face-to-face design.

Respondent C-R8, "I feel the sales reps are more vested who meet face to face, more engaged."

Another 14% of respondents mentioned technology problems with virtual meetings when identifying a face-to-face meeting design.

Respondent C-R10 stated, "There are too many problems with technology for virtual meetings."

When designing the best meeting design, productivity was mentioned by 14% of the client team face-to-face meeting design respondents.

Respondent C-R14 said, "Face to face is better; the virtual meetings we recently had with the store and vendors did not drive sales the same as face to face."

Another consideration that informed the face-to-face meeting design of the client team, at 14%, was company guidelines.

Respondent C-R5 said, "We are currently virtual. I want to move back to face to face once the office opens up in the future."

Client Team Hybrid Design

Figure 14: Client Team Hybrid Meeting Design
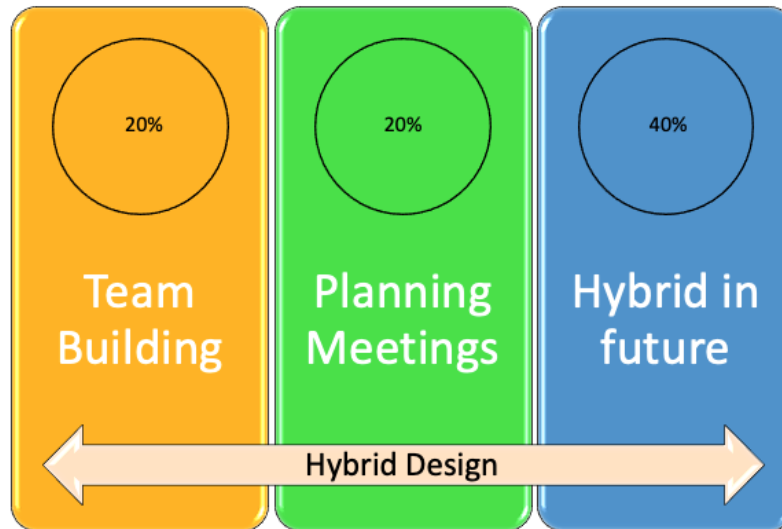
As previously shown in Figure 11, a hybrid meeting design was preferred by 26% of the Client Team. Reasons mentioned for this design were team building, planning meetings, and hybrid in the future (Figure 14).

Respondent C-R2, "I will meet face to face to build relationships, but also virtually. It is important to the team to build relationships with the salesperson."

Respondent C-R13, "Hybrid is best. If working on the planning sheet, a virtual meeting works because you are just reviewing numbers, so virtual works in that case."

Respondent C-R17 stated, "We are currently virtual. Right now, we will meet some face-to-face in a limited capacity, but our company requires mostly virtual. I would want a hybrid design in the future."

QUANTITATIVE FINDINGS

Quantitative Analysis to Research Hypothesis Questions Tested

3. H1 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting quality than virtual meetings.

4. H2 face-to-face meetings result in higher <u>client</u> perceptions of meeting quality than virtual meetings.

5. H3 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting effectiveness than virtual meetings.

6. H4 face-to-face meetings result in higher <u>client</u> perceptions than virtual meetings.

H1 face-to-face meetings result in higher <u>sales team</u> perceptions of <u>meeting quality</u> than virtual meetings.

Table 5: Hypothesis Testing - H1

t-Test: Two-Sample Assuming Equal Variances		
	Sales Team Quality FTF vs Virtual	
	Sales Team FTF Quality	Sales Team Virtual Quality
Mean	4.76	4.33
Variance	0.47	0.63
Observations		7.00
Pooled Variance	0.55	
Hypothesized Mean Difference	0.00	
df	12.00	
t Stat	1.08	
P(T<=t) one-tail	0.15	
t Critical one-tail	1.78	
P(T<=t) two-tail	0.30	
t Critical two-tail	2.18	

There was no significant effect on Sales team meeting Quality at FTF vs Virtual meeting t(12) = 1.081, p> .05 despite Sales team meetings FTF (M=4.7, SD =.69) attaining higher scores than sales meeting Quality Virtually (M=4.33, SD = .79) (Table 5).

H2 face-to-face meetings result in higher <u>client</u> perceptions of <u>meeting quality</u> than virtual meetings.

Table 6: Hypothesis Testing - H2

t-Test: Two-Sample Assuming Equal Variances		
FTF meetings result in hight client perceptions of meeting quality than Virtual meetings.		
	Client FTF Quality	*Client Virtual Quality*
Mean	4.67	5.33
Variance	0.67	2.27
Observations	6.00	6.00
Pooled Variance	1.47	
Hypothesized Mean Difference	0.00	
df	10.00	
t Stat	-0.95	
P(T<=t) one-tail	0.18	
t Critical one-tail	1.81	
P(T<=t) two-tail	0.36	
t Critical two-tail	2.23	

There was no significant effect on Client team meeting Quality at FTF vs Virtual meeting $t(10)$ = -.95, P .05 Moreover, Client team meetings FTF (M=4.67, SD =.81) attaining lower scores than sales meeting Quality Virtually (M=5.33, SD = 1.50) (Table 6).

H3 face-to-face meetings result in higher <u>sales team</u> perceptions of <u>meeting effectiveness</u> than virtual meetings.

Table 7: Hypothesis Testing - H3

FTF meeting result in higher sales team perceptions of meeting effectiveness than virtual meetings.		
	Sales Team FTF Effectiveness	*Sales Team Virtual Effectiveness*
Mean	5.52	5.95
Variance	0.25	0.61
Observations	7.00	7.00
Pooled Variance	0.43	
Hypothesized Mean Difference	0.00	
df	12.00	
t Stat	-1.22	
P(T<=t) one-tail	0.12	
t Critical one-tail	1.78	
P(T<=t) two-tail	0.25	
t Critical two-tail	2.18	

There was no significant effect on Sales team meeting effectiveness FTF vs Virtual $t(12) = -1.22$, $p>.05$. In fact, despite Sales team meetings FTF (M=5.52, SD =.50) attained lower scores than Sales Team meeting effectiveness Virtually (M=5.95, SD = .78) (Table 7).

H4 face-to-face meetings result in higher <u>client</u> perceptions of <u>meeting effectiveness</u> than virtual meetings.

Table 8: Hypothesis Testing - H4

t-Test: Two-Sample Assuming Equal Variances		
FTF meeting result in higher client perceptions of meeting effectiveness than virtual meetings.		
	Client FTF Effectivenss	Client Virtual Effectivenss
Mean	6.28	6.44
Variance	1.80	1.14
Observations	6.00	6.00
Pooled Variance	1.47	
Hypothesized Mean Difference	0.00	
df	10.00	
t Stat	-0.24	
P(T<=t) one-tail	0.41	
t Critical one-tail	1.81	
P(T<=t) two-tail	0.82	
t Critical two-tail	2.23	

There was no significant effect on Client team meeting effectiveness at FTF vs Virtual meeting $t(10) = -.24$, $p<.05$. Client team meetings FTF (M=6.28, SD =.1.34) attained lower scores than Client meeting effectiveness Virtually (M=6.44, SD = 1.06) (Table 8).

Quantitative and Qualitative Analysis Meeting Mod Design Overlaps

- In the quantitative findings, the clients reported increased meeting effectiveness and quality when meeting virtually.

- Qualitative CID results with the client team reported the idea meeting mode as 37% face-to-face, 37% virtual, and 26% hybrid model.

- In quantitative findings, the sales teams reported increased meeting effectiveness virtually but also increased meeting quality when face to face.

- Qualitative CID results with the sales team reported the idea meeting mode design at 55% face-to-face, 25% hybrid, 15% customer request, and 5% virtual.

In summary, the findings captured in the qualitative CID meeting with the sales team reported 55% face-to-face meeting design, 25% hybrid, 15% virtual, and 5% customer request. The client team qualitative CID meetings finding reported 37% face-to-face, 37% virtual, and 26% hybrid. For the quantitative findings with the sales teams, the mean score was higher for meeting quality when meeting face to face but scored a higher mean on meeting effectiveness when meeting virtually. The client team quantitative findings suggested virtual meetings are more effective and increased quality vs face to face meetings. The mixed method approach did reflect overlaps in developing the ideal meeting mode.

CHAPTER 5

DISCUSSION

The aim of the research was to identify and understand the patterns and impacts on meetings between sales teams and clients moving the meetings from face-to-face to virtual. Does meeting modality impact the quality, effectiveness, and desired outcomes of the sales team and client interaction? The research method deployed was a mixed method of both qualitative and quantitative research. For the quantitative research, a systems approach was administered called consumer idealized design that targeted the specific group's sales team and clients and asked them to design the ideal meeting mode with the highest quality and effectiveness. The second method of research was a quantitative survey study that was also deployed to the sales teams and clients testing the following hypothesis:

7. H1 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting quality than virtual meetings.

8. H2 face-to-face meetings result in higher <u>client</u> perceptions of meeting quality than virtual meetings.

9. H3 face-to-face meetings result in higher <u>sales team</u> perceptions of meeting effectiveness than virtual meetings.

10. H4 face-to-face meetings result in higher <u>client</u> perceptions than virtual meetings.

The results from the qualitative consumer idealized design research compared to the quantitative research results reflect how systems thinking approach results are different from the quantitative results linked back to a nonlinear thinking approach versus a linear thinking approach. This mixed method research approach answers the research question, and the research

results highlight the impact and effects on the sales team and client practices and policy now and in the future. Findings captured in the qualitative consumer idealized design meetings with the sales team reported 55% face-to-face meeting design, 25% hybrid, 15% virtual, and 5% customer request. The client team qualitative consumer idealized design meetings finding reported 37% face-to-face, 37% virtual, and 26% hybrid. The consumer idealized design meeting was held virtually. The sales team meeting was done with everyone on a Microsoft team call and lasted about ninety minutes. The team was asked what the ideal meeting mode design would be using a picture of a car representing the meeting and the steering wheel as the meeting mode. Learning domes were shared to reflect meeting quality descriptions and meeting effectiveness descriptions found from scholarly peer-reviewed research. For the clients, the same process was deployed, but the meetings were held one on one virtual meetings.

For the quantitative findings with the sales teams, the mean score was higher for meeting quality when meeting face to face but scored a higher mean on meeting effectiveness when meeting virtually (Figure 15).

Figure 15: Sales Team Quantitative Findings, Meeting Quality Versus Effectiveness
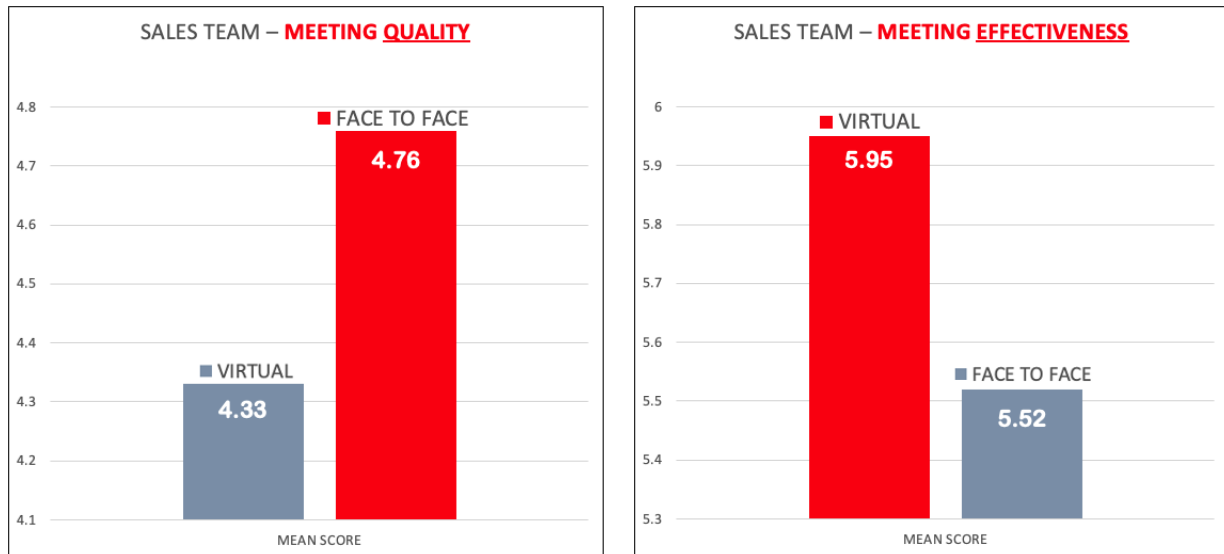
The client team quantitative findings scored a higher mean for virtual meetings

effectiveness and increased mean score on quality versus face-to-face meetings (Figure 16).

Figure 16: Client Team Quantitative Findings, Meeting Quality Versus Effectiveness
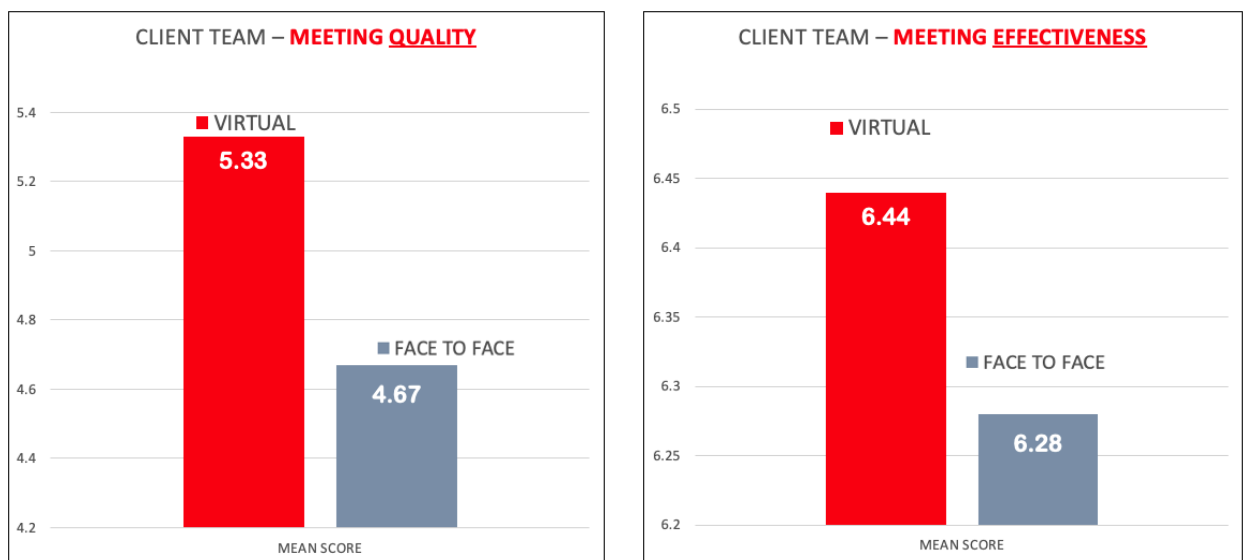
The quantitative research was done using a Qualtrics survey email with twelve questions (Appendix B). Six questions were on meeting quality and six questions were on meeting effectiveness. Each question used a Likert scale of 1-7 with a range from strongly disagree to strongly agree. The meeting question measured meeting quality and effectiveness when face to face and virtually. The mixed method approach deploying both the qualitative and quantitative did reflect overlaps in developing the ideal meeting mode explained later in the findings section.

The qualitative findings suggest that the sales team's ideal meeting mode was 55% face-to-face and hybrid 25% of the time and identified the meeting modes to be preferred as face-to-face, but also open to virtual meetings. For the clients, the ideal meeting mode was 37% face-to-face and 37% virtual also suggesting a hybrid mode would have the most quality and effectiveness. The systems approach utilizing the consumer idealized design model supports the statement that surveys are nothing more than tracking studies and people often lie about their feelings (Pourdehnad, Robinson 2001). The quantitative survey results on meeting quality and effectiveness with the sales teams and clients suggest how adopting a systems view via the consumer idea design process resulted in different outcomes versus the quantitative results.

The quantitative survey findings suggested that clients perceived virtual meetings with the sales team had a higher quality and effectiveness than face-to-face meetings (Table 5). The sales team on the other hand in the survey suggested that virtual meetings are more effective, but the meeting quality was best during face to face. If we only looked at the quantitative findings, my recommendations on future meetings between sales teams and clients would need to shift more to a virtual meeting mode environment. The purpose of the consumer idealized design meeting was to produce a design that a relevant and representative group of users considers to be ideal. Ackoff specifically states that "Producers often try to find out what consumers want by

asking them. This seldom yields useful information because the consumers either don't know what they want or they try (or avoid) answers they think are expected of them." Pourdehnad, J, Robinson, J. Patrick, (2001). The mixed method approach in this research teased out more of stakeholder desires, and the consumer idealized design developed a system-thinking framework and knowledge for understanding meeting mode quality and effectiveness with client and sales groups. This knowledge will have potential implications on practitioners (sales teams and clients) as well as implications on future consumer product manufacturers and retail headquarter corporate policy.

The findings from the quantitative and qualitative research compared to the literature reveal the following patterns and overlaps.

Based on the consumer idealized design research Respondent S-R6 stated, "I get more accomplished when I am there with the buyer". Respondent S-R18 communicated that "face-to-face is more effective." These results fell in line with the IMEX Group in partnership with the Meetology®, "Does meeting face to face improve creativity compared to virtual meetings?" The results showed face-to-face sessions generate more ideas, a "marginally" high quality of ideas, and a greater variety of ideas than phone or video chat. On average face-to-face meetings generated 30% more ideas than virtual meetings (Matt Alderton, 2013).

Virtual organizations allow the dispersed talent of diversified knowledge to be brought together and contribute to the attainment of the organization's goals. (Jaya Ahujua, 2010). Respondent C-R7 stated that "I like virtual meetings because it's easier for planning, and you can bring a lot of people into the meeting." Cohen et al. (2011) further examined the relevance of meeting design in how employees assess their overall value. While many of their findings validated those of Leach et al. (2009), Cohen et al. arrived at a more tailored set of

recommendations. They stressed the importance of inviting only relevant personnel "central to the meeting's purpose" rather than including large numbers of employees who may or may not need to be present (Cohen et al., 2011, p. 10).

Meeting themes with the objective of reviewing spreadsheets or planning favored virtual mode. Respondent C-R6 said that "Key planning meetings should be virtual." The quantitative analysis from the client team also reflected higher meeting quality and effectiveness virtually. This supported the finding that client teams preferred planning virtually. When meetings are necessary, Mroz et al. (2018) argue, inviting critical personnel who will make meaningful contributions and ensuring that the meeting agenda is circulated beforehand and stuck to rigorously during the meeting, are vital to productivity. One other key component often overlooked in assessing meeting effectiveness is follow-up. Mroz et al. (2018) found that when meeting leaders check in with attendees regarding meeting substance and outcomes, the meetings themselves are viewed as more useful.

Research has also examined participant multitasking during virtual meetings versus face-to-face meeting modes. Respondent S-R2 reported, "I feel face-to-face is more personal because you get the full attention and focus of the client." Research has also examined participation engagement and multitasking behavior during virtual meetings. Participants found lower motivation to engage both behaviorally and cognitively when participants are in a meeting remotely versus face to face. Also noticed that turning the video on or off was a critical signal on engagement, with the camera on signally high engagement and the camera off indicating low engagement. Almost 30% of virtual meetings include multitasking, and more likely multitasking is happening when the video camera and audio are turned off (Karl, 2021). One early study of virtual meetings was conducted in 2001 by Lantz. Her research focused on group tasks that must

be completed jointly and how group members interacting electronically affects productivity. Referring to the virtual workspace as the Collaborative Virtual Environment (CVE), Lantz (2001) examined how communications between employees can suffer when it relies entirely on electronic interface. She prefaced her study by noting that "face-to-face meetings are very important initially in a new group," in order to establish rapport among the members (Lantz, 2001, p. 111, 112). The consumer idealized design results from the sales team's preferred meeting mode of face-to-face of 55% and preferred a hybrid meeting mode of 25%. Also, two-thirds of the sales team said a good ratio for constructing a hybrid model would be 50% face-to-face and 50% virtual. By 2010, virtual meetings and team projects were quite common, and scholars were looking more closely at how to assess whether working arrangements of this sort were productive. Schweitzer and Duxbury (2010) sought to fill this gap by examining "how can a team's degree of virtuality be defined and measured," and "the relationship between a team's degree of virtuality and its effectiveness" (p. 208). Unlike previous research of virtual teams, the authors of this study used surveys of employees who work virtually to arrive at their conclusions. Their key finding indicated that traditional measures of team performance and meeting value declined among those working entirely in the virtual space (Schweitzer & Duxbury, 2010).

Another study from 2010, this one by Ahuja, examined how technologies themselves can shape employee attitudes toward virtual work and meetings. Ahuja's (2010) main research interest was in determining how team performance correlates with individual team members' level of comfort with the modes of communication used for virtual work. She notes that, for instance, "it is a myth that communicating in virtual teams is easier than in traditional teams. Nonverbal signs and body language, facial expressions are entirely absent in virtual teams" (Ahuja, 2010, p. 38). While team members may be able to exchange information across great

distances using virtual means, many of the traditional elements of interpersonal communication are lacking. Listening to the client was also reported from the consumer idealized design meetings. With the face-to-face model as their design preference, 11% of the data returned by these respondents mentioned that they would still have to take into consideration what their customers desired. According to James Ward, customers are only satisfied when their requirements are consistently met, and the only quality that matters is the customer's perception of quality. Strategic leadership also plays a role in the meeting modes. Writing in 2008, Bergiel, Bergiel, and Balsmeier asserted that some elements required for successful team collaboration were the same as those needed for face-to-face cooperation; specifically, virtual teams required solid leadership, trust between members, good communication, and access to necessary technology. However, certain facets of virtual collaboration are also unique to the virtual space. Working across time zones, language and cultural disconnects, and difficulties with conflict resolution can all compromise the work of virtual teams (Bergiel, Bergiel, & Balsmeier, 2008). The last point is significant. According to Bergiel, Bergiel, and Balsmeier (2008), virtual team leaders must be proactive about checking in with team members and ensuring that no interpersonal problems arise, a task which, in a conventional office setting, could "come to the team leader's attention by the act of walking around the water cooler or via a casual conversation with a team member" (p. 105). In other words, leaders cannot neglect team member dynamics just because those members are not in the same physical space.

All qualitative and quantitative research was executed between March of 2021 through February 2022 during Covid 19. Due to Covid 19, challenges and limitations impacted the consumer idealized design process because it was done virtually when in the past the consumer idealized design meetings with the groups took place in meeting rooms with poster boards to

inspire ideas as well as whiteboards and easels for groups to make notes and draw up ideas and concepts. As I learned from this research, the consumer idealized design meeting being held virtually could have impacts on creative ideas, trust, participation, and engagement to name a few that may have affected the meeting's quality and effectiveness. How to improve this will be explained in the future research section in my discussion.

For the quantitative research, the Covid-19 implications executed during the survey were not a limitation. By using the Qualtrics survey process, emails on the survey were sent directly to the sales team and client teams. However, the following limitations did exist in the Qualtrics survey. First, the sales team and client team chosen for the survey were not chosen randomly; they were chosen in major markets in the United States, but not randomly. Second, the number of participants in the survey was ten sales team members and ten client team members. Because the "N" was low in this study, the ability to get a significant p-value in the t-test may have not been achieved. Other potential noise in the data was that the survey was conducted while many of the participants were either on lockdown from Covid-19 or limited to only working from home. I will address ideas to improve this in the future research section in my discussion.

Key learnings and applications from the research would suggest asking the customer to give the salesperson their requested or required meeting mode along with who should attend the meetings and where. Sales teams and clients should not assume virtual meetings are the most productive and deliver the highest quality and effectiveness. One application that could be implemented is that during annual planning between the sales teams and clients they mutually script a meeting mode plan. For example, planning meetings would be held virtually three times a year, and merchandising and new item tasting meetings will take place face to face at three times a year. Strategic leadership will be needed to support this new meeting mode mindset.

Future research on the hybrid meeting mode is needed to understand how the sales trends have changed moving meetings from virtual to hybrid. Another opportunity for future research would be to include both the sales teams and client team together to design the ideal meeting mode versus separately. Also, it would be useful to understand the impacts on the clients and sales teams from meetings moving to hybrid. Understanding the effects on the office and travel expenses will also need to be researched and analyzed. Would retailer and sales teams' offices be closed for good moving to a hybrid meeting mode model? Hybrid meeting mode research can also be applied to other sectors such as schools, colleges, "telehealth" practices, and even consumer shoppers.

In summary, the research found when applying a systems method utilizing the Consumer Idealized Design process to design the ideal meeting mode both the sales teams and client teams designed a hybrid meeting model that included face-to-face and virtual meetings as the most effective and highest quality meeting mode. The consumer idealized design process supported the nonlinear systems thinking process by involving key stakeholders and creating the ideal meeting mode versus the linear quantitative results that did not tease out critical meeting success factors. Companies should utilize hybrid meeting practices to increase meeting quality and effectiveness. Continued research is recommended in this area.

Potential Implications for Practitioners

- Understanding the effects on meeting mode changes could uncover "blind spots" in strategic planning and affect deliverables or outcomes for both the sales and profits for both the Sales Teams and Clients.
- Significant decreases in meeting effectiveness and quality may affect relationships with target stakeholders thus impacting mutual goal attainment in both face-to-face

and virtual meetings and in turn affect system changes and the overall company mission of better serving all its stakeholders.

- "Best Practices" in stakeholder communication takes many forms, including meeting format, to improve meeting quality and effectiveness.

Potential Implications for Policy

- Training opportunities can potentially emerge in virtual and face-to-face meeting quality and effectiveness.

- Corporate funding and investment currently focused on internal versus external meeting quality and effectiveness could be reallocated also to external meeting quality and effectiveness focus and included as a tactic in companies' strategic plan. For example, improving quality and effectiveness within the wall of the company is just as important outside the wall of the company with the sales and client teams.

- Re-visiting how investments on meeting travel for face-to-face meetings might be adjusted as well as virtual technology for internal meetings and external meetings increased.

- Develop virtual and face-to-face interactive planning models.

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S Morrison-Smith, J Ruiz - SN Applied Sciences, 2020 - Spring

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Appendix A: Meeting Quality and Effectiveness Descriptions

Meeting Quality & Effectiveness Descriptions

Quality Meeting Descriptions

- The determination of the quality that really matters is the customers perception (Ward).

- Three components to quality meetings 1) Reliability 2)Responsiveness 3) Customer feels valued and important (Ford)

- Quality if defined by the customer and has many scales, one for each the customer considers important (Deming)

- The only determination of quality that matters is the customers perception (Ward)

- Development of trust and ideas shared (Breuer)

- Meeting interruptions and time demands (Rogelberg)

- Requirements consistently being met (Ward)

Effectiveness Meeting Descriptions

- Meeting self confidence is a function of meeting effectiveness (Bandura).

- Meeting effectives increases as the participants quickly see where they are aligned and there are disjointed (Baily).

- "Achieving work goals" is a measure of meeting effectiveness (Rogelberg)

- Virtual team meeting members must know how they are to work and their meeting objectives (Berry).

- Perception of meeting effectiveness would be promoted as the extent people come prepared for meetings. ()

- How and when to speak (Winter)

- Pre meeting preparation & achieving work goals (Rogelberg)

Appendix B: Qualitative Survey Questions

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "you are confident you know how and when to how to speak with your sales representative when meeting v

○ 1-Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Strongly agree

□

Q11

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "my meeting preparation is well planned when meeting virtually with my sales representative?"

○ 1-Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Strongly agree

□

Q12

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you feel and think your goals are being achieved during virtual meetings with your sales representative?

○ 1-Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Stongly agree

□

Q13

Comment or thoughts you like to share please enter below

[   ]

Q7

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "I have trust with my sales representative during virtual meetings?"

○ 1- Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Strongly agree

Q8

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following: "your sales representative views virtual meetings as an interruption from their day?

○ 1-Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Strongly agree

Q9

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with this statement: "your meeting requirements are constantly being met virtually with the sales representative?'

○ 1-Strongly disagree
○ 2
○ 3
○ 4
○ 5
○ 6
○ 7-Strongly agree

□

Q10

5

6

7-Strongly agree

Q4

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "you are confident you know how and when to how to speak with your sales representative meeting face to

1-Strongly disagree

2

3

4

5

6

7-Strongly agree

Q5

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "my meeting preparation is well planned when meeting face to face with my representative?"

1-Strongly disagree

2

3

4

5

6

7-Strongly agree

Q6

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following: "my goals are being achieved during face to face meetings with your sales representative?

1-Strongly disagree

2

3

4

5

6

7-Strongly agree

Try the new survey builder, which we'll move everyone to in May. You can switch back at any time until then.

Face To Face & Virtual Meetings Clients

Published

iQ Score: Great

In the next section of questions think about how you meeting with your sales now

Block Options

Q1

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree with the following statement: "I have trust with my sales representative during face to face meetings?"

1-Strongly disagree

Quality

2

3

4

5

6

7-Strongly agree

Q2

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do you agree that your sales representative view your face to face meetings as an interruption from their day?

1-Strongly disagree

Quality

2

3

4

5

6

7-Strongly agree

Q3

On a scale of 1 to 7, where 1 is strongly disagree and 7 is strongly agree, how much do agree with this statement: "your meeting requirements are constantly are being met face to face with the sale representative?"

1-Strongly disagree

Quality

2

4

Dependant Var	Group	Mode Independent Var	Client Questions	1-7 Scale
Quality	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how much do you agree with the following statement," I have trust with	
Quality	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how much do you believe your sales represenative view your face to fa	
Quality	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, are you meeting requirements constantly being met face to face with th	
Effectiveness	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, are you confident you know how and when to how to speak with your s	
Effectiveness	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how much do you agree with the following statement "My meeting pre	
Effectiveness	Sales Team	Face to Face	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how do you feel your goals are being achieved during face to face meet	
Quality	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how much do you agree with the following statement," I have trust with	
Quality	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, are you meeting requirements constantly being met during virtual meet	
Quality	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, are you confident you know how and when to how to speak with your s	
Effectiveness	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, are you confident you know how and when to how to speak with your s	
Effectiveness	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, "My meeting preparation is well planned" when meeting virtually with	
Effectiveness	Sales Team	Virtual	On a scale of 1 to 7, where 1 is strongly disagree and seven is strongly agree, how do you feel your goals are being achieved during virtual meetings v	

Appendix C: Survey Letter

From: Mark Pisacane
Sent: Monday, February 15, 2021 11:12 AM
To: Mark Pisacane <Mark_Pisacane@campbells.com>

I am surveying the sales representatives and buyers (clients) on Quality and Effectiveness when meeting Face-To-Face (before COVID19) and meeting Virtually (after COVID19).

Please click the link below and take a few minutes to answer the first 1- 6 questions thinking back to when you met Face-To-Face and the following 7-12 questions based on your virtual meetings.

https://jefferson.co1.qualtrics.com/jfe/form/SV_eDPnSkfpyO6mT78

The survey is anonymous.

Please complete the survey by 2/26/21.

Thank you!

Mark L. Pisacane
267-446-1138

Mark L. Pisacane
267-446-1138 - Cell
mark_pisacane@campbells.com

Appendix D: Illustration Describing "Ideal" Meeting Mode

Figure 1

Meeting Quality Descriptions Learning Dome

- Develop Trust
- Meeting Interruptions
- Requirements Consistently Met
- Feeling Valued
- Responsiveness
- Reliability

Meeting Effectiveness Descriptions Learning Dome

- Pre-Meeting Preparation
- Achieve Work Goals
- Know How and When to Speak
- Start and End on Time
- How Quickly Understand and Diagnoses
- Meeting Agenda

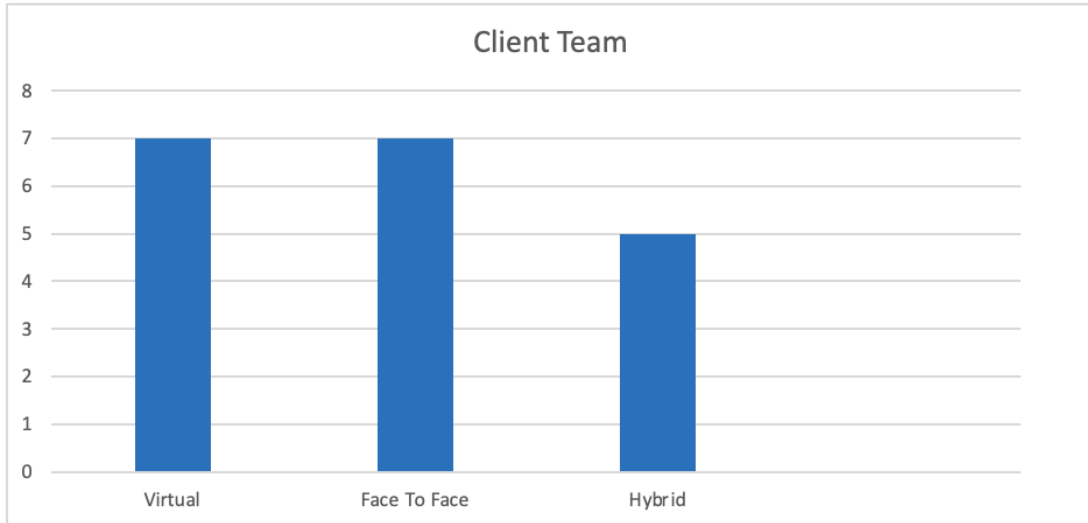Sales teams asked to best design the ideal meeting mode "steering wheel".

Clients asked to best design the ideal meeting mode "steering wheel".
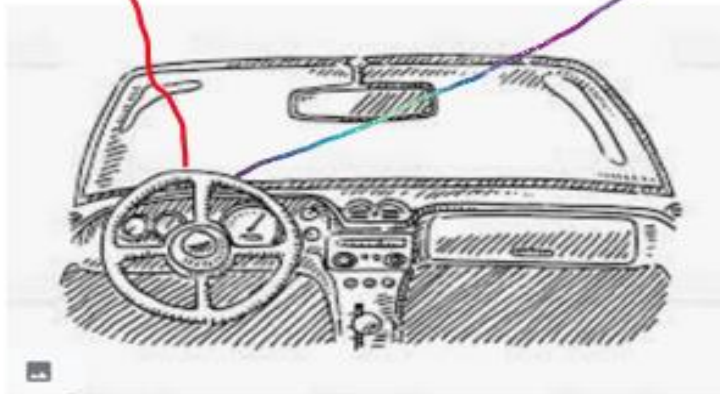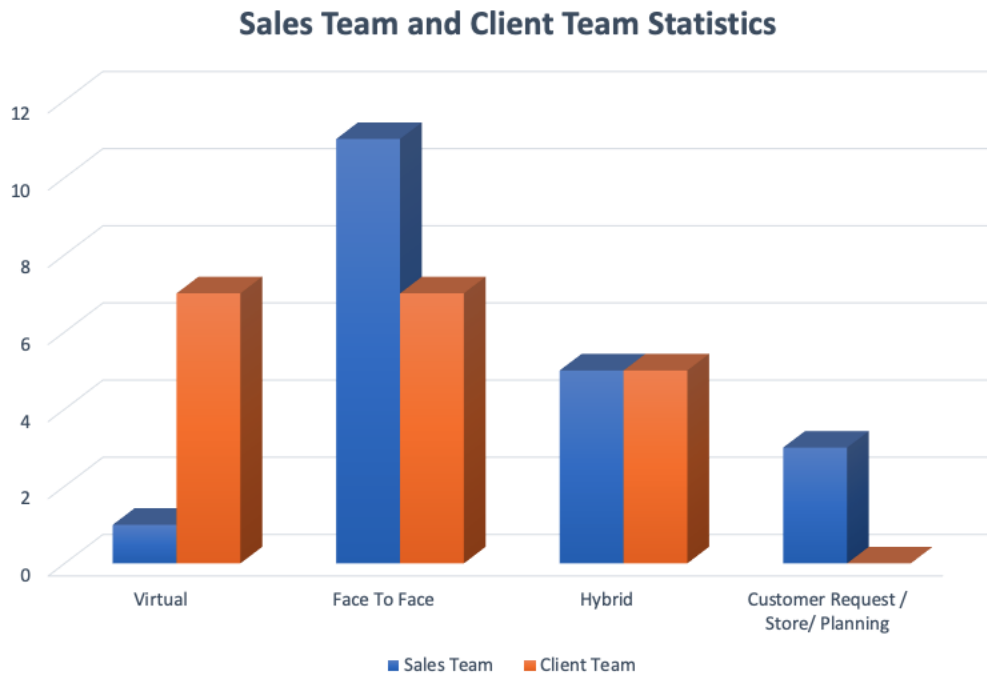
Appendix E: Sales Team Ideal Meeting Design Response Statistics
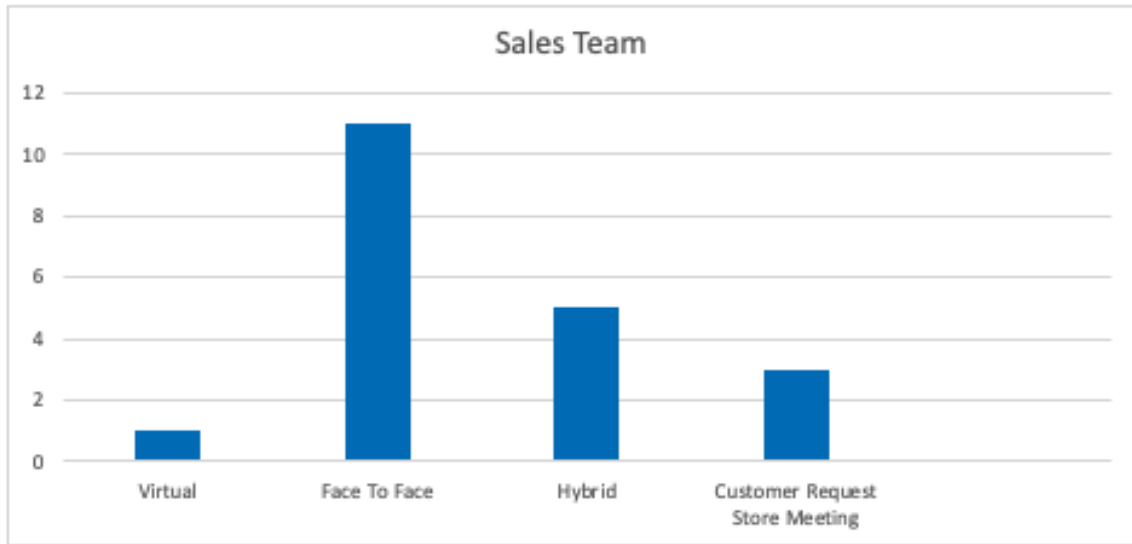
Appendix F: Client Team Ideal Meeting Design Response Statistics

Appendix G: Sales and Client Team Side-by-Side Ideal Meeting Design Response Statistics

Sales Team and Client Team Statistics

Appendix H: Sales Team Meeting Design Notes

Sales Team CID Meeting Notes 10/22/21				
Role	**Respondent**	**Gender**	**Location**	**Wheel Design Comments**
Sales Customer Manager	S-R1	Male	Florida	I like hybrid; a 50/50 ratio of face-to-face with virtual works best.
Sales Customer Manager	S-R2	Female	Michigan	I feel face to face in more personal because you get the full attention and focus of the client.
Sales Customer Manager	S-R3	Male	Minnesota	Face to face is always better from my perspective
Sales Customer Manager	S-R4	Female	Illinois	My thoughts are buyer calls the shots so I follow them
Sales Customer Manager	S-R5	Female	Atlanta	Depends on the customer but as a new rep I can more traction face to face because no relationship. Once relationship established could change meeting Face to face
Sales Customer Manager	S-R6	Male	New York	In my area, face to face is still best way to connect. I get more accomplished when I am there with buyer. My buyers adapted to virtual during covid the are now expecting me to meet in person
Sales Customer Manager	S-R7	Male	New Jersey	Hybrid. 50/50. I am able to get big orders from virtual meetings
Director Sales East	S-R8	Female	New York	Depends on the role of the rep. If you are dealing with a local to small retailer, face-to-face is preferred, but with a headquarter customer they may require a virtual meeting design.
Sales Customer Manager	S-R9	Female	Minnesota	I feel more comfortable face-to-face, but it will depend on what the customer wishes.
Director Sales East	S-R10	Male	Minnesota	Depend on customer request. Follow what the customer is asking for.
Sales Customer Manager	S-R11	Femaile	North Carolina	Prefer FTF to build relatioship but customer may ask for virtual
Sales Customer Manager	S-R12	Male	Maryland	Hybrid model prefered. Follow up with customers virtual but samples testing needs to be face to face
Sales Customer Manager	S-R13	Male	Massachusetts	Face to face eye contact is important to feel out the customer. Prefer 100% face to face. Need to see actual store situation
Sales Customer Manager	S-R14	Female	Florida	Hybrid is good with face to face 80%. I like Face to Face best way.
Sales Customer Manager	S-R15	Female	Ohio	Hybrid and face to face is best
Sales Customer Manager	S-R16	Female	Pensylvania	Blend FTF and Hybrid. It's good to walk the stores with the buyer.
Sales Customer Manager	S-R17	Male	Massachusetts	I like Virtual but also want to meet and tour stores with buyer
Sales Customer Manager	S-R18	Male	Minnesota	Face to face is more effective .
Sales Customer Manager	S-R19	Male	Pennsylvania	Need FTF to see the expression of my buyers
Sales Customer Manager	S-R20	Male	Texas	follow what the customer asks

Appendix I: Client Team Meeting Design Notes

Client Team CID Notes				
Role	Respondent	Gender	Location	Wheel Design Comments
Client Buyer	C-R1	Male	New York	A virtual meeting design is more effective, but I'm willing to have store level meeting also. Virtual effective but will work at store level also so Hybrid. Will need to follow company guidelines now. Will meet key larger vendor when approved. In market good for team building
Client Buyer	C-R2	Male	Texas	I will meet face to face to build relationships, but also virturally. It is important to to the team to build relationships with the sales person.
Client Buyer	C-R3	Female	Pensylvania	Planning virtual meeting work best. But meeting at store face to face with sales reps is productive and would me at store.
Client Buyer	C-R4	Female	North Carolina	Virtual is ok but meeting face to face builds relationship. Example having dinner with a sales representative for sampling new items built our relationship, so I am open to some face-to-face meetings.
Client Buyer	C-R5	Male	Minnesota	We are currently virtual. I want to move back to face to face once the office opens up in the future. Best meeting face to face
Client Buyer	C-R6	Female	Minnesota	Key planning meetings should be virtual
Client Buyer	C-R7	Female	Minnesota	I like virtual meetings because it's easier for planning, and you can bring a lot of people into the meeting. Planning meetings virtual. Being in store and face to face with sales rep ok. Virtual is preferred, but for presenting new items, face to face is best.
Client Buyer	C-R8	Male	Pensylvania	Face to Face is preferred. I feel the sales reps are ore vested who meet face to face, more engaged.
Client Buyer	C-R9	Male	Minnesota	Face to Face is ok now starting to open more meeting face to face. Hybrid good plan.
Client Buyer	C-R10	Female	Pensylvania	Face to Face meeting prefered. There are too many problems with technology for virtual meetings.
Client Buyer	C-R11	Female	Minnesota	I like virtual meetings can bring allot of people into the meeting and get plans across. Face-to-face works best at trade shows.
Client Buyer	C-R12	Female	Illinois	Face to face would depend on the sales volume the rep has. Larger sales volume would meet face to face. I don't have time to meeting face to face with small vendors. I prefer virtual, but I'm willing to meet face to face with a rep that has larger sales volume.
Client Buyer	C-R13	Female	Illinois	Hybrid is best. If working on the planning sheet, a virtual meeting works because you are just reviewing numbers, so virtual works in that case.
Client Buyer	C-R14	Male	Illinois	Face to face is better because you get to share product and see new things. Face to face is better; the virtual meetings we recently had with the store and vendors did not drive sales the same as face to face.
Client Buyer	C-R15	Female	Rhode Island	Like face to face meetings but will do virtual also. Best is Hybrid at this point.
Client Buyer	C-R16	Female	New York	Face to face best design.
Client Buyer	C-R17	Female	Wisconsin	We are currently virtual. Right now, we will meet some face to face in a limited capacity, but our company requires mostly virtual. I would want a hybrid design in the future.
Client Buyer	C-R18	Male	Michigan	Face to face best to meet try samples and not feel rushed. Some virtual by prefer face to face.
Client Buyer	C-R19	Male	New Jersey	Face to face

APPENDIX J: Sales Team - Themes and Sub-Themes

HYBRID (5)	FACE TO FACE (13)	CUSTOMER WISHES (7)	VIRTUAL (1)
Ratio of face-to-face meetings vs. virtual meetings ("I prefer hybrid and 50/50 works best.") - 50% face to face/50% virtual (2) - 80% face to face/20% virtual (1) - No ratio mentioned (2)	Establishing and maintaining relationship with customer ("I feel face to face is more personal because you get the customer's full attention and focus.") - More personal -Full attention and focus - Build relationship - Connect - Eye contact	Service industry caters primarily to customer wishes ("My thoughts are the buyer calls the shots so I follow them.")	Large orders ("I am able to get big orders from virtual meetings."
	Local and small customers ("If local to small retailer, face to face is good"		Headquarter customers ("Headquarter customers may require virtual.")
	Understanding the actual store situation ("I need to see the actual store situation.") - Walk/tour store with buyer		Following up ("Prefer virtual to follow up with customers.")
	Productivity ("I get more accomplished when I am there with the buyer.") - More traction		
	Samples testing ("Samples testing is best face to face") - See expression of buyer		

APPENDIX K: Client Team - Themes and Sub-Themes

HYBRID (5)	FACE TO FACE (7)	VIRTUAL (7)
- In-market good for **team building**. C-R2 "It's important to build relationship with sales person" C-R2	**New items and samples** best face to face, Intro of new items & ideas C-R14 *"Face to face is better because you get to share product and see new things."* C-R18 "It's best to meet to try samples and not feel rushed"	**Field meetings**, C-r1 "Virtual is effective, but I'm willing to have store level meetings also" C-R3 "Prefer virtual, but it is productive to meet sales reps at store level, so willing to do that" 57%
- **Company requires virtual** prefer hybrid in future, C-R9 "We are now starting to open more meetings f2f" Hybrid good plan	Sales reps **more vested** C-R8 "I feel the sales reps are more vested who meet face to face, more engaged"	**Build relationships**, C-R4, "meeting f2f builds relationships. example: Having dinner with a sales rep for sampling new items built our relationship, open to f2f meetings"14%
- Hybrid good, but **virtual for planning mtgs**, C-R13 "Planning meetings are best virtual because we are just reviewing numbers"	**Problems with virtual**, C-R10 "There are too many problems with technology for virtual meetings"	**Time constraints**, C-R12 "I don't have time to meet f2f with small vendors. F2f depends on volume the rep has. Willing to meet f2f with rep that has larger sales volume" 14%
	Productivity C-R14, "Face to face is better; the virtual meetings we recently had with the store and vendors did not drive3 sales the same as face to face."	**Trade shows** C-R11 "f2f works best at trade shows" 14%
	Company guidelines, C-R5 "We are currently virtual. I want to move back to face to face once the office opens **up in the future.**	**New items, sampling** f2f, C-R7 "Virtual is preferred, but for new items f2f is best" 29%
		Planning meetings. mentioned 57%, C-R6 "Key planning meetings should be virtual" C-R11 "I like virtual meetings because it's easier to get plans across and you can

		bring a lot of people into the meeting"

APPENDIX L: Geographic Locations - Combined Sales Team and Client Team