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Tell Me More: How Salespeople Encourage Customer Disclosure

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Abstract

Purpose- This paper explores salesperson-customer interactions to identify actual behaviors that result in enhanced customer disclosure and classify them as disclosure tactics, and to explore whether certain tactics are more likely to lead to salesperson-customer relationship advancement.

Design/methodology/approach-This qualitative research uses conversation analysis to identify salesperson disclosure tactics that result in customer disclosure, using twelve video-recordings of authentic B2B initial sales meetings between a salesperson and customer.

Findings-Findings showed four disclosure tactics that salespeople use to get customers to disclose information: embedded expertise claims, tailored references, demonstrations of preparation and customer-orientation and benevolence. These tactics appear more often and are executed differently in sales meetings that successfully advance.

Originality/Value-The research addresses an unexplored area of specific salesperson behaviors and their connection to customer disclosure and relationship advancement in the exploration phase. Additionally, we fill a gap than cannot be addressed with traditional survey or interview data, and bring conversation analysis to this particular area.

Keywords-Salesperson-customer relationship, exploration, sales interaction, conversation analysis.

Article Classification-Research Paper

Introduction

Salesperson-customer interpersonal relationships have long been recognized as critical to successful selling in certain contexts (e.g., Keillor and Parker, 2000; Macintosh and Lockshin, 1996; Park and Dietz, 2006), but we do not actually know the behaviors that salespeople use when first meeting customers that can establish the conditions that might lead to an exchange relationship. What specific behaviors or conversational statements does the salesperson use to elicit a response from the customer, to uncover information, and ultimately to take the relationship through exploration to a deeper relationship?

Multiple perspectives exist on the development of relationships between salespeople and their customers (e.g., Anderson and Narus, 1990; Dwyer et al., 1987; Iacobucci and Zerrillo 1997). Although initially proposed for business-to-business relationships, Dwyer, Schurr and Oh (1987)'s framework on the stages of relationship development has been used to understand how salesperson-customer relationships develop (Williams, 1998). Dwyer and colleagues (1987) propose that relational partners must first become aware of each other, then move into a stage of exploration needed before the relationship can be expanded, committed or eventually dissolved. Yet, to date, no one has looked at the specific behaviors that are used by a salesperson in an actual exploration-stage selling situation.

Studies have explored the need for constructs such as credibility (Belonax et al., 2007; Sharma 1990) and trust (Lussier and Vachon, 2017; Plank et al., 1999), to explain relationship development in the exploration phase. However, results of these studies have not been validated in actual sales meetings, nor have they focused on specific conversational behaviors that salespeople adopt. Despite the well accepted premise that these constructs are important to success in salesperson-customer relationship development, sales academics and

practitioners do not know which, or even whether, certain salesperson behaviors result in customer responses that move the relationship forward in the exploration phase, potentially underlying these latent constructs.

This study investigates salesperson conversational behaviors used in real-life business-to-business initial sales encounters and attempts to understand both the type of behaviors (categorization of different tactics), as well as which tactics seem to elicit disclosure by the customers under what conditions. This research method, conversation analysis, has not previously been applied to relationship exploration or disclosure in the sales area. As we explore what behaviors are most prevalent in actual sales practice, the categorization of salesperson tactics and the understanding of resulting customer responses can contribute to expand existing relationship development findings.

We know that relationships develop through, and are expressed in, communication between the salesperson and the customer (Swan et al., 1985). In what follows, we demonstrate that, in actual salesperson–customer interactions, certain salesperson behaviors lead to enhanced customer disclosure, and that when these behaviors occur, the initial sales meeting is more likely to be successful.

Thus, this paper contributes to the extant literature by identifying specific behaviors used by salespeople in relationship exploration, developing categories of the behaviors identified as disclosure tactics, investigating how these behaviors lead to enhanced customer disclosure and sales meeting success, and by applying conversation analysis to an as-yet unexplored area of salesperson-customer relationship development. We begin by discussing a theoretical perspective for understanding relationship exploration that framed our approach.

Theoretical Foundation

Dwyer, Schurr and Oh (1987) identify five relationship stages: awareness, exploration, expansion, commitment, and dissolution. Awareness, the first stage, does not involve any interaction by partners, so the first time they interact, they have advanced to the exploration phase. In exploration, potential partners consider the possibility of exchange, evaluating each other, including sub-processes like communication, norm development, and expectation setting (which includes constructs like trust). Interaction and information exchange are at the heart of this stage (Altman and Taylor, 1973; Claycomb and Frankwick, 2010).

Trust and credibility, along with other similar constructs, constitute important components in establishing interpersonal relationships between a salesperson and a customer (Dowell et al., 2013, Morgan and Hunt, 1994). These constructs are related to advancing the relationship to the expansion phase (e.g., Dwyer et al., 1987) and have been shown to be related to performance (e.g., Belonax et al., 2007; Lussier and Vachon, 2017). However, each of these constructs are perceptions of the partners, and thus not under the direct control of the salesperson for developing the relationship. The salesperson can only control his or her own behaviors. Since we know that communication and information exchange underlies relationship expansion, we focus on those actions that will lead to obtaining new information.

Previous models of salesperson-customer interaction have included disclosure (e.g., Crosby et al., 1990). We define disclosure as sharing of information not otherwise known or available. During exploration, buyer and seller may disclose (reveal information) about themselves, their companies and their needs. For the exploration phase to advance, in the business-to-business domain, the disclosure of information must be reciprocal (Dwyer, Schurr and Oh 1987). As noted by Crosby and colleagues (1990),

> *In a relational sales setting, customer disclosure is critical for the salesperson, who often is called upon to solve complex and ill-structured problems. Reluctance on the part of the customer to reveal critical personal and/or business-related information may block or severely delay satisfactory problem resolution.*

They demonstrated a connection between mutual disclosure and relationship quality (trust and satisfaction) within the US-based insurance business. Brock and Zhou (2012) showed that disclosure is also affected by customer intimacy, which mediates the effect on trust and satisfaction.

Thought work is limited, one sales study did demonstrate the relationship of social disclosure (providing information beyond only that required for a transaction to occur) with trust, attraction and satisfaction (Jacobs et al., 2001) at the salesperson to customer level of interaction. Jacobs and colleagues conducted this research in a role play situation with insurance salespeople and consumer couples and measured the time and number of topics that were disclosed as related to self-reports of trust, attraction and satisfaction. This leaves open a number of questions including whether these findings hold across authentic interactions, complex business-to-business selling and how they impact the potential for continued relationship development, among others.

Other work in the area has looked at mutual disclosure, as well, but has considered it at the firm-to-firm or network level of analysis. For example, Biggemann (2020) explored mutual disclosure in relationships through a case study. He found that sharing information helps to foster inter-company collaboration and enhances the value of the existing business relationship. This helps to support the idea that disclosure is critically important but falls short of informing us about individual behaviors or tactics utilized in actual interactions to advance relationship development.

Based on these articles, our theoretical foundation relies on salesperson-customer interaction in the exploration stage of relationship development. Advancement of the relationship will depend on the disclosure. Thus, the salesperson must use conversational behaviors that encourage the customer to disclose task and social information necessary to potentially advance the relationship. While disclosure may underly such constructs as trust and credibility, and others, we concern ourselves with observable salesperson conversational behaviors and the customer's response to them. Our guiding research questions were:

1. What behaviors does the salesperson use to elicit disclosure by the customer?

2. Can these behaviors be classified into specific disclosure tactics?

3. Which of these disclosure tactics are the most effective at eliciting information under what conditions?

4. Does customer disclosure advance the salesperson-customer relationship?

Research Method

This paper uses a qualitative analysis of interactional behaviors that are exhibited by salespeople within initial (first-time) business-to-business sales encounters. The research uses qualitative methods and inductive reasoning, moving from observations of real-life sales interaction to identifying patterns and regularities, and finally establishing findings concerning effective sales tactics. It employs conversational analysis to do so.

Data

The data consist of observations from twelve businesses, from the following industries: service, heavy equipment, ICT, consulting, communication, and public service. Four of these were major companies that conduct business globally, while the remaining companies were medium-sized and conduct business throughout Europe, in a specific region, or in one country (Finland). The video-recorded sales meetings between these companies consisted of two Finnish participants, a salesperson and a prospective customer. Picture 1 is a

blurred still-shot from one of our recordings and it depicts a common seating configuration

for two participants so that they face each other on the opposite sides of a table.

Picture 1. The customer is on the left and the salesperson with a laptop on the right

Although we focus on Finnish sales interaction, we believe that our results are

applicable for developing an understanding of disclosure tactics and responses for most

Western industrial cultures. Most of the companies involved in the video-recordings are

multi-national corporations and their personnel travel throughout the world and receive

training in international contexts. Furthermore, many of their salespeople have graduated

from international universities. In general, we believe that the context of business-to-business

sales interaction, which is international by nature, is a more important factor than the

nationality of the participants in terms of developing an understanding and meaning of

specific interactional behaviors. Of course, as with any other qualitative study, confirmability

of these findings remains imperative. But our purpose here is naturalistic inquiry – a search

for deeper understanding in terms of disclosure behaviors, rather than a representative sample

to test the understanding developed from the qualitative study (Lincoln and Guba 1985).

Before collecting data, permission for the recordings was first granted by the

company's management, and then the salespeople proposed video-recording specific sales

meetings with prospective customers. Both the salesperson and the customer signed informed

consent forms to video-record their meeting. A researcher set up a camera and left the

meeting room. The participants in these meetings received general information on the

research project but were not informed of the research questions. Twelve sales meetings were

recorded. It has been suggested that recording an activity can disrupt and transform it.

However, as has been mentioned in other similar studies, the camera is not always relevant to

participants and they tend to forget its presence when focusing on business concerns (e.g.,

Kaski et al., 2018; Mondada, 2013). Table 1 presents a description of the videos that were

included in our dataset.

Table 1. Data Description

Sales firm	Customer	Gender and Experience*	Need	Length	Outcome
1. **Human** Human resources	**Construction** Construction	SP: Female, low exp. C: Male, medium exp.	Agency-hired labor	28 min.	Collaboration agreed
2. **Technical** Printing services	**Logistics** Logistics	SP: Male, medium exp. C: Male, high exp.	Re-evaluation of the print solution	1 h 45 min.	Next meeting is scheduled
3. **Technical**	**Engineering** Heavy industry	SP: Male, medium exp. C: Female, medium exp.	Re-evaluation of the print solution	1 h 51 min.	Next contact is scheduled
4. **Consult** Strategic consultancy	**Health** Statutory corporation	SP: Female, low exp. C: Male, medium exp.	Development ideas	48 min.	Next contact is scheduled
5. **Consult**	**Television** Broadcasting	SP: Female, low exp. C: Female, medium exp.	Strengthen the customer involvement	55 min.	SP will contact C again on an unspecified date
6. **Consult**	**Innovation** Statutory corporation	SP: Female, low exp. C: Female, high exp.	Increase workplace well-being	27 min.	SP will send C materials but no date for further contact is agreed
7. **Consult**	**Telecomm** Telecomm.	SP: Female, low exp. C: Female, low exp.	Customer feedback	59 min.	SP will send C materials, no date for further contact agreed
8. **Consult**	**Property**	SP: Male, low exp.	Make company	1 h 2 min.	Next contact

	Construction	C's: 2 females, both have medium exp.	brand more recognizable		is scheduled
9. **Advertising** Consultancy	**Food** Food industry	SP: Male, low exp. C: Male, medium exp.	Marketing	21 min.	SP will send C materials, no date for contact agreed
10. **Video** Video-message software	**Planning** Consultancy	SP: Male, low exp. C: Male, high exp.	Video-based marketing	23 min.	C declines the offer and further contact
11. **Video**	**City** Communal education	SP: Male, low exp. C: Male, medium exp.	Video-message platform for students	1 h 24 min.	C gives SP contact details and agrees to help SP to book a meeting
12. **Video**	**University** Polytechnic	SP: Male, low exp. C: Male, high exp.	Video-message platform for teaching	1 h 5 min.	Next contact is scheduled

*SP=salesperson, C=customer, low exp. 0-3 years, medium exp. 4-7 years, high exp. 8 or more years

The companies were part of a more extensive data collection that happens over a two-year time frame. The individual salespeople were aware of the project but did not know the researchers prior to the recording. There was minimal contact. Following the recordings, short debrief interviews were conducted as part of the larger project but not specific to disclosure. The overall tactics and conclusions from the research were provided as feedback to the participating salespeople ranging from 3-6 months later and there was consensus that what was concluded accurately represented what happens in their sales calls.

Method

The research method applied in this study is Conversation Analysis (henceforth CA), an accepted analytical method adopted extensively in linguistics and the social sciences, including research in social welfare (Toerien et al., 2013), legal communication (Zimmerman, 1992), and medical interaction (Heritage et al., 2007). The purpose of qualitative research is to attain a more profound understanding rather than to test causal relationships in a large sample that is representative of a population. Earlier, CA has been

applied to B2B sales encounters regarding rapport-building (Clark et al.; Kaski et al., 2018), persuasion (Humă et al., 2019), and price negotiation (Niemi and Hirvonen, 2019).

The CA method of analysis is micro-level, and it establishes the connections from interactional behaviors to how sequences occur. To analyze social interaction, CA utilizes the same features of interaction that the participants use to produce and understand it. First, CA studies interaction as a sequentially organized activity (Schegloff, 2007). Actions are often paired so that a first speaker's turn can be used as a basis to interpret what a next speaker says. Second, the sequential organization of interaction offers a proof procedure for the study of interaction (Sacks et al., 1974: 728–729). For example, a turn such as A: *Why don't you come and see me sometimes?* might be heard as a complaint and therefore responded to by B as *I'm sorry I've been terribly tied up lately.* However, the sequence in fact was as follows A: *Why don't you come and see me sometimes?* B: *I would like to*, displaying B's comprehending that A's turn conveys an invitation. At this point, speaker A confirmed B's understanding of his prior turn as correct and he replied *I would like you to,* when both speaker B and the analyst who examined the recording could discern that A's first utterance was indeed intended as an invitation (Heritage, 1984: 254–259). Thus, participants publicly demonstrate and sustain their understanding of the on-going activity on a turn-by-turn basis and this serves as an important resource for CA analysis. Finally, CA research focusses on the regularities that occur in the sequential context that a specific practice occurs (Sidnell, 2013). A collection of examples of a given practice enables a reasonable generalization of its generic features, even though CA is not a quantitative discipline.

The recordings were originally transcribed verbatim and in considerable detail to capture non-verbal components such as particular aspects of timing of speech, and how things were said, including certain intonational features, emphasis, and possible elongating of

sounds and words. The English transcriptions included in this article are adaptation of professional translations from Finnish; standard orthography from CA is limited in this reporting. The transcriptions have been simplified to emphasize the analytically most important features. A native English-speaking researcher reviewed the technical translations to assure that the meanings were clear in a sales context and some minor editing was undertaken to convey the clearest meaning to the English reader. Furthermore, a Finnish-speaking researcher checked approximately 20% of the editing clarifications and then reviewed the interaction (and revisited the recordings) to assure that the final translations adequately reflected the conversation. It is nonetheless important to note that all analysis was conducted in Finnish by native Finnish CA-trained researchers, which means that the results cannot be skewed by the translated versions presented here. The study design conformed to established ethics guidelines proposed by the researchers' universities and complete confidentiality and anonymity were guaranteed for the individual participants.

Research Process

The research process of this study consisted of multiple steps. We first conducted a literature review to determine the underlying outcomes of interaction in the exploration phase, identifying disclosure as a key phenomenon of interest. Next, we began in-depth observation of our video-recorded data to identify systematic patterns of interactional behaviors that salespeople adopt and that result in customers sharing detailed and unknown information. Once we identified an example of a customer divulging information and connected it to the salesperson behavior that preceded it, we began to search for similar instances in other video-recordings to obtain further evidence of its significance for customer disclosure. Table 2 presents an overview of our analytical process.

Table 2. The research process.

Process step	Example findings
1. Defining the phenomenon	We defined the outcome of an established customer disclosure as when the customer opens up and shares information for example about needs and challenges
2. Identifying the moments where the customer becomes more open and discloses information in the data: Repeated observation of the video-recorded business meetings that were successful.	When customers disclose information, they often provide exact time references and mention the decision-makers in their company.
3. Examining the salesperson actions that led to customers divulging information: Repeated observation of the salesperson actions within that meeting when the customer opens up.	We observed that salespeople demonstrate customer-orientation and benevolence, offer proof of their expertise, give references, and demonstrate their preparation for a meeting.
4. Detecting similar instances (further evidence) in the data by observing the data for similar cases.	We discovered evidence that customer-orientation and benevolence prompted customer disclosure across our video-recordings
5. Searching for unsuccessful business meetings, identification of the presence and absence of the above instances.	We encountered cases of the salesperson claiming expertise but not being successful in the customer disclose information.
6. Establishing conclusions by comparing results across both the successful and unsuccessful business meetings	We observed that the expertise claims need to be embedded within other actions and that references need to be tailored to suit the particular customer. Otherwise, they do not have the same effect on disclosure.
7. Validation of findings and conclusions: The results were presented to and discussed with participants and other members of their sales teams.	Interviewees confirmed that the researchers' understandings accurately reflected their thoughts on how the interaction proceeded.
8. Forming practical and theoretical arguments	See Discussion

From these analyses, we identified four interactional behaviors salespeople engage in that led to customer disclosure: embedded expertise claims, tailored references, demonstrations of preparation. as well as customer-orientation and benevolence. In the findings below, as is consistent with other CA research, we report only particular "typical" examples of the activities we uncovered in the larger dataset.

Results

The following sections begin by exploring the data in terms of disclosure. The most central interactional behaviors that salespeople use to foster customer disclosure are embedded expertise claims, tailored references, demonstrations of preparation and demonstrations of customer-orientation. We provide a series of detailed examples from

successful and unsuccessful meetings where disclosure accompanies (or fail to accompany) identified behaviors. We decided to examine initial meetings that were both successful and unsuccessful in order to assure a representative sample of interaction that led to disclosure, as well as examples that did not. These examples will provide supporting evidence for the four identified behaviors that appear to successfully result in customer disclosure to the B2B salesperson.

Salesperson behaviors that elicit customer disclosure

As mentioned earlier, we define disclosure as customers becoming more open and sharing information. The absence of this response therefore occurs when customers withhold important information and describe their situation evasively or in vague terms. Eventually, failure to disclose results in the customer rejecting the salesperson proposal to continue the exchange relationship.

In order to present our analysis clearly, the four main interactional behaviors displayed by the salespeople to successfully elicit information disclosure are explained further in Table 3.

Table 3. Findings: salesperson behaviors that elicit disclosure

Salesperson action	Explanation	Illustration
Embedded expertise claim	The salesperson claims that he or she has experience and/or capabilities that are potentially relevant for the customer and embed(s) it in some on-going activity. Thus, the expertise claim does not stand out as the on-going focal activity and is less likely to be challenged.	"*What kind of objectives do you have on your agenda so that I could customize what I will tell because we have been involved in so much. But do you have or is there something urgent?*"
Tailored reference	The salesperson demonstrates prior experience in working on issues that are similar to the customer's business context, or claims shared networks with the customer.	"*For ten years I have successfully done business with PERSON NAME from SUBSIDIARY, and we've both benefited from it.*"

Demonstration of preparation	The salesperson mentions the background work that he or she did to prepare for the meeting.	*"I've done some background work during the years and discussed it with your procurement director. I understand that you have a global contract on printing with FIRM."*
Demonstration of customer-Orientation	The salesperson claims to be considering the customer's best interest and/or demonstrates his or her willingness to tailor the service description to the customer's business context.	*"When I personally think what your incentive here is; or why would you listen to me about this, and maybe say yes. please let's do this, or no thanks not yet; so maybe through this analysis --"*

An unsuccessful case

This section introduces the details of a sales encounter that was clearly

unsuccessful in the sense that the customer rejected further consideration of the proposed

service and declined further discussions on the topic. First, we analyze features of the

salesperson's interaction behavior that led to the customer signaling a problem using

Example 1. This example was typical of a failure to successfully use a disclosure tactic that

occurred multiple times in our dataset. We subsequently point out that later, in the same

meeting, the customer did not disclose information to the salesperson (Example 2).

The analyzed examples in this section are excerpts from the first minutes of an

initial sales meeting between a prospective customer (C1) from a consulting company and a

salesperson (SP1) from a company that offers a program for preparing video-recorded

presentations (or video-messages). Before the excerpt in Example 1, SP1 said that he has

familiarized himself with the customer by accessing their webpage. At this point, SP1 briefly

introduced C1 to the company he represents, telling him that it is approximately three years

old and that it has created a video-presentation platform. In Example 1, SP1 continued from

here.

Example 1. Sales: VIDEO. Customer: PLANNING. (01:26-02:23)
```
1  SP1: and, ehm, we've been doing it for about three years now
2       and we have offered it to businesses as a sales tool,
```

```
3        or as educational or coaching tool, for internal communication,
4        as an example, and then we have also schools that use it
((4 lines omitted during which SP1 tells how two universities use their
service as a teaching technology tool))
9 SP1:   and, ehm, we have now offered this to, a little over
10       one hundred and sixty businesses have started using it in Finland
11       and they apply it in different applications
12       so that probably sells most as a sales tool, but then
13       second comes educational coaching
14 C1:   you did not mention external communication like webpages and
15       such, why?
16       (0.2)
17 SP1:  .hhhh yes, I mean th- or let's put it this way, that this is ---
```

The salesperson behaviors in Example 1 included expertise claims (Arndt et al.

2014) that highlighted SP1's experience ('We've been doing it for about three years now,'

line 1, 'one hundred and sixty businesses have started using it in Finland,' line 10).

Furthermore, the salesperson behaviors were designed to appeal to different types of

customers, as there were four possible applications mentioned for the service (lines 4–6).

However, no clear application had been designed for this specific customer, C1. This created

a problem. When SP1 was concluding his description, C1 signaled a problem and asked for

an account ("why," line 15). Thus, C1 considered SP2's service description to be contrary to

his expectations (Bolden and Robinson 2011). Then SP1 faced the challenge of providing an

account, and this account became complex (see SP1's search for a proper way to express

himself, line 17). We will not focus on the details of this account but will concentrate on the

outcome. Example 2 presents SP1 continuing his account and C1 cutting it short.

Example 2. Sales: VIDEO. Customer: PLANNING (03:18-04:03)

```
1  SP1: If I would make it for our home page
2       I would want to make a high-quality video, so I probably
3       would edit it with something
4       (0.4)
5  C1:  okay
6  SP1: I would make…
7  C1:  in that case I have misunderstood the point
8       because my idea was that we might use the video when
9       we want to describe something a little more complicated, some
10      service entity or product as we do it in a live situation
```

```
11 SP1: yes
12 C1:  so when our consultant explains to a client face-to-face
13      that this is how this strategy works or what this new
14      face building is about, that was my image
15      (0.2)
16 C1:  so then you probably are not the right provider
```

The reason SP1 provided for not mentioning external communication, the potentially low quality of the video recording their service offers (lines 2–3), was a decisive factor for C1. In overlap with SP1's continuing account, C1 initiated his response, implying that he is no longer interested in the product that SP1 offers (lines 7–16).

C1 proceeded to offer reasons as to why their requirements would not be served by SP1's product ("because," in line 8). C1 formulated his talk in vague terms, such as "something a little more complicated" (lines 9–10). That is, he did not disclose a detailed description of the needs or challenges that his company had. The salesperson was unsuccessful in getting information and thus in advancing the relationship in general ("you probably are not the right provider," line 16). Overall, C1's response seems to have resulted from SP1's poor application of the disclosure technique of expertise claims. Finally, SP1's pejorative description of the service (lines 1–3 in Example 2) provoked a rejection-implicative response from C1.

After Example 2, only 4 minutes into this business meeting, it is evident that SP1's task of getting customer disclosure and advancing the sales process has become more challenging. He would need to change the image that C1 had of the service. This probably is difficult, considering the rejection-implicative talk by C1 in Example 2. In fact, later in the meeting, C1 explicitly rejected the proposal by SP1 and stated that the company that he represents is not a coaching firm. In other words, SP1 failed to address C1, and his sales pitch provided a reason for C1 to reject his offer. These patterns were confirmed in other cases that were analyzed from the larger dataset and are set out as examples of what was typically seen.

At this point, we will not further analyze this example, but we will return to this case when we can compare it to the successful case presented in the next section.

Successful cases

Let us now turn to cases of meetings that result in a positive resolution in the sense that an advance in the sales process is agreed upon. Before the positive result is achieved, the salesperson has been able to get sufficient customer disclosure. We consider the customer's candid description of the current challenges facing his or her company to be disclosure. We will now turn to demonstrate both distinctive interactional behaviors from our data that the salespeople exploit to gain disclosure from customers, as well as the linguistic responses that the customers subsequently display.

A central method in getting disclosure across our dataset is the salesperson's expertise claims. By producing an expertise claim, the salesperson provides evidence that he or she has experience and/or capabilities that are potentially relevant to the customer (cf. expertise statements, Arndt et al. 2014). However, as was evident in Example 1, expertise claims are not always successful. A prominent feature of successful expertise claims in our data is that they are embedded in some other on-going activity. This serves as a means for salespeople to avoid claiming expertise when they might be subject to challenge. Furthermore, an embedded expertise claim is not a focal activity during interaction.

In Example 3, two other methods that salespeople use in our data to gain disclosure are evident: offering tailored business references as well as demonstrating they have completed background work and preparation. Example 3 occurs in a first meeting between a salesperson (SP2) working for a well-known international company that offers print solutions, and a prospective customer (C2) from a global transportation company. The excerpt in Example 3 begins after an extended sequence of small talk concerning a shared

interest in BMW cars they discovered fortuitously. This small talk may be important, as

observed similarity between the participants has been connected to relationship success

(Manning et al. 2012: 2014). Despite the possibly ideal beginning for the encounter, SP2 in

Example 3 uses disclosure-producing behavioral tactics.

Example 3. Sales: TECHNICAL. Customer: LOGISTICS (10:29–11:05)

```
 1  SP2: so ehm I thought about the history between YOURFIRM and MYFIRM
 2  C2:  mm
 3  SP2: I will overview quickly. For ten years I have successfully done
 4       business with PERSON NAME from SUBSIDIARY, and we've
 5       both benefited. And then with your company
 6       so actually, we have a long history, but because of
 7       many things, we have not yet had much
 8       business in printing or information management
 9  C2:  no
10  SP2: and ehm, I've done some background work
11       during the years and discussed it with your procurement
12       director. I understand or I know that you have a global contract
13       on printing with FIRM
14  C2:  yeah
```

The first step in SP2's disclosure tactics was providing a business reference that

was tailored to this customer, C2. SP2 claimed that he had ten years' experience in

collaborating with a subsidiary company of the company that C2 represented. SP2 stated that

this collaboration had been rewarding "for both sides" (line 5), implying customer

satisfaction and thus salesperson expertise. Thus, we have a typical "successful" expertise

claim in our data, one that is embedded within another action (here, the other action is

"describing the shared history of the two companies"). Furthermore, it is important to note

that SP2 mentioned the name of the managing director he had worked with (line 4). As this

director's name was likely to be familiar to C2, SP2 in practice referred to the director to

imply that they shared networks (knowledge; for example, see Manning et al. 2012, 264).

The second step in the disclosure tactics was to allude to background work and

preparation that SP2 had conducted for this meeting. SP2 explained that he had conducted

"some background work" (line 10) and displayed knowledge of C2's current situation (lines

12–13). In Example 4, SP2 progressed to the third step in his disclosure tactics,

demonstrating customer-orientation and benevolence. These constructs have previously been

reported to relate to positive relationship building (Bateman and Valentine 2015; Doney and

Cannon 1997). Again, SP1 also claimed expertise while attending to other matters.

Example 4. Sales: TECHNICAL. Customer: LOGISTICS. (11:46-13:22)

```
1  SP2: I planned that I will talk about the topic of managed print
   services
2  C2:  okay
3  SP2: and it means, in plain Finnish, that as an outcome
4       from this meeting, if we get the deal that is,
5       we offer you a tool. hhhhh that helps you
6       to easily find out the current situation.
7       What is going on, for example, here in ADDRESS
8       related to printing?
9  C2:  mm-m
10 SP2: where you might have bottlenecks or pain points (0.2)
11      that we could develop, and so that those development points
12      would relate to either data security, cost control,
13      increasing the efficiency of things, that is, the efficiency of
14      processes, this kind of thing. So concrete benefit
((3 lines omitted, during which SP2 states that C2 would not need to
exchange print devices immediately))
18 SP2: when I personally think what your incentive here is, or
19      why would you listen to me about this and maybe say
20      yes please let's do this, or no thanks not yet,
21      so maybe that is that through this analysis,
22      you acquire a tool that you can use in the situation
23      when you next time discuss here that what
24      should we do to the print services. Should we continue with ABCD?
25      Should we improve it? How do we want to do it?
26 C2:  actually, very good, and there is no such thing as
27      coincidence, although it occasionally feels so.
28      We did in our board of directors
29      in the first week of March what we introduced (.)
30      last week to our middle management (.) our environmental goals
31 SP2: yes
32 C2:  for the year two thousand fourteen two thousand fifteen and
33 SP2: yes
34 C2:  the follow-up of those and - -
```

After proposing the topic of "managed print services" (line 1), SP2 displayed

both benevolence and customer-orientation by demonstrating a willingness to speak candidly

("in plain Finnish," line 3) and by presenting C2 as the beneficiary ("a tool that helps you to easily find out the current situation," lines 5–6). He discussed the "concrete benefits" for the customer (line 14) that concerned data security, cost control and process efficiency. This three-part list of possible customer benefits had a "generalizing" impact (Drew 1990) that implied SP2's full familiarity with print services and thus expertise in providing value for C2, and it was embedded in the behavior that demonstrated customer benefits (lines 5–14). SP2 proceeded to express his personal attributes of customer-orientation and benevolence by searching for customer benefits ("when I personally think," line 18).

C1's response openly disclosed the current situation in his company, including the challenges it posed. His response began with a turn-initial *actually* (line 26), which signifies a coincidence (cf. Schegloff, 1996, 63), and implies what he says next is noteworthy. As Clift (2001, 260–261) observed for *actually* in English, the original Finnish particle *itseasias*, 'actually', indicates that the customer intends to produce something more positive than what was expected from him at this point in the business meeting. C2 first offered a positive assessment of SP2's statement ("actually very good," line 26). Then he elaborated on his positive assessment with a description of environmental goals that were presented to the company "in our board of directors" (line 28) and he also referred to an exact time ("in the first week of March," line 29, "last week," line 30).

Examples 3 and 4 reveal how SP2 made expertise claims that were embedded in other behaviors, gave a business reference that was tailored to the customer, demonstrated background work and preparation for the meeting, and claimed customer-orientation and benevolence. When combined, these factors resulted in C2 speaking openly about the actual situation in his company and the challenges they encountered, sharing private information. C2's positive, "more-than-expected" reaction to SP2's sales pitch was marked with a turn-initial *actually* in this example.

Through these two examples, we have demonstrated how salespeople use specific behaviors to get customer disclosure. These behaviors were 1) claiming expertise 2) providing tailored references, 3) demonstrating prior research and preparation, and 4) demonstrating customer-orientation and benevolence. Claims of expertise are an extensively used resource in our data, and they can appear at multiple points during an interaction. Both examples contained expertise claims and these claims were embedded in other behaviors. An expertise claim occurred in a story about the company's history (Example 3) and demonstration of possible benefits for the customer (Example 4). The many functions and possible places of expertise claims suggest that salespeople consider them an important method to incorporate in their sales interaction as disclosure tactics. The other practices are more restricted to certain parts in the overall structure of the business meeting. Tailored references and demonstrations of prior research and preparation usually occurred during an early phase of the sales meeting, whereas demonstrations of customer orientation and benevolence tend to occur later in the meeting. These examples are typical, and the patterns were repeated multiple times in the data.

To summarize, Table 4 presents a comparison of disclosure tactics used by the salespeople from failed versus successful initial sales meetings.

Table 4. Comparison of salesperson disclosure tactics in failed and successful cases

Disclosure tactic	Failed case (Examples 1 and 2)	Successfulcase (Examples 3 and 4)
Expertise claims	Yes, openly presented	Yes, embedded in other actions
References	General reference (number of application users, their business fields)	Tailored references
Demonstration of background work and preparation	No	Explicit and articulated
Demonstration of benevolence and customer orientation	Weak customer orientation e.g., mentioning "sales, education and coaching" as application areas	Explicit and articulated

Discussion

This study answers the first research question regarding what behaviors salespeople utilize to obtain disclosure from customers, and how these behaviors may be classified to enhance understanding of how salespeople elicit disclosure. By analyzing video-recordings of genuine business-to-business sales encounters, four salesperson behaviors were particularly prominent in getting customer disclosure: embedded expertise claims, tailored references, demonstration of background work and preparation, and displays of customer-orientation and benevolence. These tactics help the salesperson to maintain the focus of the conversation on the customers and their businesses in order to solicit information that is important to advancing the relationship. An embedded expertise claim does not create an expectation of a customer response, and thus it does not induce further talk about the sales company. Tailored references present the sales company as a suitable business partner for the customer organization and suggest that the two share networks and knowledge. By demonstrating that they are prepared, salespeople convey the impression that they are willing to work for the customer and indicate that the sales presentation is designed specifically for the customer. Finally, demonstrations of customer-orientation and benevolence emphasize that the primary concern is the customer.

The study also aimed to understand which of these disclosure tactics are the most effective at eliciting information. We see that expertise claims seem to be the most used and often elicit disclosure. The other tactics can be used effectively, but often tailored references and demonstrations of preparation and research are more effective earlier in the initial sales meeting, whereas customer-orientation and benevolence seem to be more effective later in the meeting.

Additionally, we wondered whether customer disclosure advance the salesperson-customer relationship. There is some evidence in this study that it does. Initial meetings advanced the relationship to additional meetings and accepted a salesperson proposal for moving forward were characterized by more disclosure tactics and, especially, by more successful application of these disclosure tactics. This study enriches knowledge on this topic not only by examining *what* is done in order to obtain disclosure but also *how* it is done. For example, we reveal a contextual limitation for expertise claims: A crucial difference arose between how salespeople claimed their expertise. According to our data, successful expertise claims occurred when accompanied in other behaviors, such stating a reason for asking a question or demonstrating customer benefits. That is, successful expertise claims were embedded in these other behaviors during the sales interaction. By embedding the expertise claim in "telling about the history between your company and my company" (Example 3), the salesperson was able to display customer-orientation and to claim expertise at the same time. By contrast, a claim of expertise that was made "on its own," was presented as a behavior that potentially required a response from the customer (Example 1). Crucially, displays of customer-orientation appeared to be almost completely absent from the failed case (Examples 1 and 2).

Lastly, consideration of culture should not be overlooked. The study was conducted with a Finnish, albeit internationally focused, sample. Cultural differences have been found in levels of self-disclosure, for example eastern cultures vs. western (e.g., Chen 1985). Other research has shown that these differences tend to be mitigated by perceptions of social mobility (Schug, Yuki & Maddux 2010), likely characteristic of our sample. Finland is highly egalitarian, with high levels of universal suffrage and is often characterized as introverted, with low levels of small talk (Studarus 2018). These characteristics could play into the data. However, it seems likely that Finns would be a conservative group on which to

study disclosure given the lower levels of it. It may make it easier to isolate and disclosure that is conducted is likely to be meaningful. Additionally, as qualitative research, our main concern was with identifying richer behavioral phenomenon than external generalizability.

Implications for theory

Our main contribution lies in the development of a categorization of disclosure tactics used by salespeople to elicit information disclosure from customers. Previous research focuses on latent relationship constructs that are not fully under the control of the salesperson. By using qualitative conversational analysis, this study provides specifics on the types of tactics that salespeople can employ in order to improve customer disclosure, which helps to advance the relationship exploration.

Additionally, previous research on salesperson-customer interaction has often utilized interviews or surveys as data (e.g., Crosby et al., 1990) or alternatively, simulated sales encounters (e.g., Jacobs et al. 2001) that have no opportunity to result in actual business agreements. Research that relies on interviews and surveys may over-emphasize exogenous differences (such as the salesperson's education and experience and company reputation; Sharma, 1990) when explaining the success or failure of sales interactions. The use of video-recordings to analyze the details of interactions between salespeople and customers in actual sales encounters makes it possible for us to identify the endogenous practices that occur when salespeople begin to gain disclosure from the customer. Overall, this study highlights the important role of micro-level social interaction between a salesperson and a customer, and it states that it is necessary to conduct further studies that have genuine sales interactions as data. We argue that this study provides a unique perspective that introduces new avenues of research to comprehend actual sales interaction and its interpersonal outcomes, which may also underlie more latent constructs such as trust.

Further, we build on research that has been conducted in a consumer domain (e.g., Crosby et al. 1990 and Jacobs et al., 2001) by conducting this research on authentic salesperson-prospective customer meetings in the business-to-business complex solution selling domain. Work in this area, particularly on disclosure has been sparse and limits are ability to understand how this social phenomenon plays a part in the development of buyer-seller interpersonal business relationships.

The results of this exploratory study also support adopting a more specific theoretical framework to analyze behaviors that advance a salesperson-customer relationship during the exploration stage. This framework should consider the important role of communicative activities adopted by the salesperson when in an exploration stage of relationship development.

As a preliminary step, we propose the following framework in Figure 1. This framework summarizes our findings and might provide an initial starting point for further research.

Figure 1. Disclosure Tactics and Their Proposed Impacts
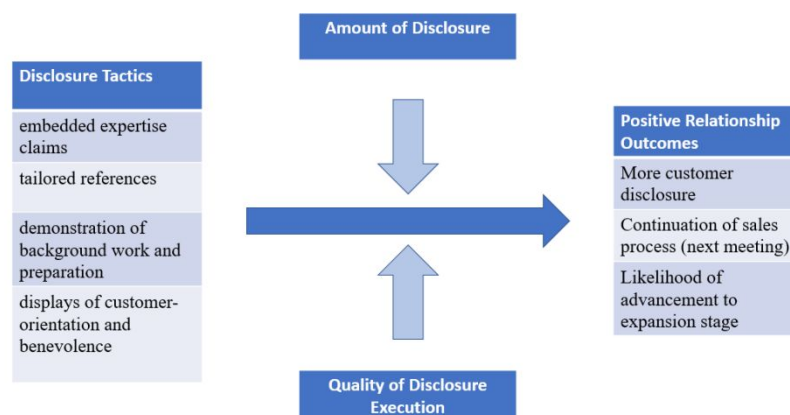
Our data demonstrate that one or two disclosure tactics are not enough and that successful salespeople draw on a set of complementary tactics. The order of disclosure tactics in Figure 1 presents a temporal relationship. The higher the disclosure tactic is, the earlier it

is used within sales negotiation in our data. This order tells us that salespeople emphasize fact-based disclosure tactics (tailored references and demonstration of background work and preparation) over ones that appeal to emotions (displays of customer-orientation and benevolence), although both are used in successful cases. Embedded expertise claims, presented highest up in Figure 1, have a special status among disclosure tactics. They are the most common disclosure tactic in our data and salespeople use them in multiple points in conversation, very early and later in the conversation. Furthermore, an embedded expertise claim is often intertwined in other disclosure tactics such as displays of customer-orientation. Thus, the four disclose tactics in Figure 1 are partly overlapping and cannot be clearly separated from each other.

Implications for practice

This study offers practical advice for salespeople and sales managers that can be useful when training salespeople in business-to-business sales. First, the salespeople need to comprehend the customer's situation to be able to tailor sales interactions to accommodate the current customer. By doing a good job of background research, the salesperson is prepared to use the disclosure tactics in an appropriate manner. Understanding, for example, customer style and preferences, might shape a better understanding of which tactics would be most effective. On a cautionary note, this advice does not mean a salesperson should attempt to script the use of disclosure tactics. Should salespeople not prepare, they unnecessarily risk the disclosure tactics not matching the customer's interests (see Examples 1 and 2). This preparation, however, should also be expressed to the customer as it represents a tactic in its own right.

Next, salespeople should know and be able to execute each of the disclosure tactics. They should have a sense of when and how to use them. For example, claiming expertise should be embedded in other statements, and particularly may be accompanied by a display of customer-orientation. Doing this enables salespeople to demonstrate that they are focused on the customer's best interests even when discussing their own prior achievements. Training that salespeople participate in should teach disclosure techniques including claiming expertise; tailored references; demonstrations of preparation; and customer-orientation and benevolence.

Salespeople should also be taught to notice customers' vague descriptions and expressions; when the customer is vague, the salesperson needs to request clarification or employ an additional disclosure tactic. The customers' vague formulations of their situations may signal that disclosure tactics are not being used or aren't working, and therefore may require a change in approach. Salespeople should be coached to use each of the disclosure tactics and to assess their effectiveness. Role playing may be an effective tool for practicing this skill set.

Finally, sales managers should be assessing and evaluating salespeople on metrics related to relationship development phases and the ability to successfully move relationships along. Outcome measures could consider capturing which relationship stages that various customers are at, and behavioral measures on the skills required to navigate successfully to the next level.

Limitations and Future Research

This study does have some limitations. First, the analysis is based on a sample of twelve recorded sales interactions. As a qualitative study, the focus is on depth of understanding. This depth is achieved at sacrifice of attention to overall generalizability. Thus, it would benefit from more rigorous quantitative confirmation with larger samples and

external validity checks. Furthermore, the data were from one country. While we believe that these salespeople are characteristic of many Western cultures and had international experience, it is necessary to confirm that these findings are not exclusively a Finnish cultural phenomenon. In addition to examining cultural differences, future research could consider if these findings apply to a variety of contextual conditions, such as brand awareness, company reputation, and firm size.

These limitations present interesting questions for future research, starting with the conceptual model. For example, possible questions include examining each individual disclosure tactic's effect on each potential outcome. Are they each equally effective in achieving the various outcomes? Does the amount of disclosure happening unilaterally moderate the disclosure tactic's effectiveness? Or are there different "ideal" amounts of disclosure with each tactic? Further, does it matter "how" the disclosure tactic is delivered? Would a construct such as "genuineness" be useful in understanding the moderating effect of the quality of tactic execution?

Another fruitful avenue might be to consider how the constructs interact with one another. Is there a potential hierarchy between the constructs? For example, if a salesperson fails to display customer orientation, does that weaken his or her ability to engage in other disclosure techniques? Future research that empirically explore the model could result in a much more nuanced model.

We also believe that additional CA research would assist in determining whether these phenomena appear in other phases of relationship building. Our study was limited to examining how disclosure operated in the exploration phase of relationship development. Further research is needed to analyze how disclosure evolves and whether the disclosure tactics change as the relationship advances. It would also be interesting to consider

the ethical implications of the disclosure of information in this context and how the disclosure

tactics may impact what and how much is disclosed.

Jacobs and colleagues (2001) define exchange specific disclosure as the sharing

of personal information to meet product and service needs. Information shared in this

category is minimally required for an exchange to occur. However, salespeople and

customers may also share social disclosure, involving personal information beyond that

needed for a sale to take place. This information is fundamental to relationship building.

Neither type of exchange has been studied in terms of specific conversational exchange.

Jacobs et al. (2001) found that only social disclosure was positively related to trust, attraction,

and satisfaction. However, this study was done with role-played scenarios between insurance

salespeople and consumer couples. Given the nature of business-to-business complex

solution selling, and the disclosure related to the company rather than the self, our work did

not make this specific distinction. However, consideration of these two types of disclosure,

both about the individual and the company, would make an interesting next step.

Further, this work specifically considered face-to-face interactions within the

selling domain, while virtual selling is growing (Rocco and Bush 2016). According to

Saleforce.com (2018), "A recent state of sales report identified that in Australia and New

Zealand, over the past three years, 57% of salespeople have increased their time spent

engaging with customers or prospects virtually (a 6% net change), while 52% have increased

the time spent meeting in person (a 4% net change)." As this area continue to grow, we will

need to understand how we encourage disclosure virtually. Do the same tactics hold in this

environment? How do they need to be modified? Similarly, as discussed earlier, culture may

play a role in disclosure, and thus further research is needed on cross-cultural and multi-

national selling contexts.

Finally, while information disclosure is certainly related to success or failure in selling, it is only one aspect. It is possible to close a deal without advancing the relationship? Sales meetings can fail even when a lot of disclosure has occurred. Future research that explores these topics would be particularly valuable. While we considered both successful cases (those that advanced to the next stage) and unsuccessful cases (those did not advance) to provide additional variation in context, it would also be valuable to clarify the key difference present in successful interaction as compared to unsuccessful interaction.

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