

Going beyond Traditional Selling Function; Sales Force Automation and its Effectiveness on CRM



Alfia Tarannum

Visiting Faculty,
Institute of Management Studies,
Devi Ahilya Vishvavidyalaya,
Indore, M.P, India.

Vivek Sharma

Assistant Professor,
Institute of Management Studies,
Devi Ahilya Vishvavidyalaya,
Indore, M.P, India.

Abstract

Organizations are increasingly building dependencies on technology today to run their businesses efficiently. Medium and Large scale organizations owe a large part of their success to the ever evolving technology that has streamlined sales processes, techniques and played a significant growth contributor. In case of retail industry, has adoption of Sales Force Automation by salespeople been identified as the key determinant influencing the organizational success? This paper is trying to understand the effectiveness of SFA in the development and successful implementation of Customer Relationship Management. For this the paper will first understand sales manager perspective and then sales executive perspective towards SFA, as a tool for customer relationship building and increasing productivity of salespeople.

The survey and Interview was carried out among sales Manager and Executives of retail outlets of five big companies to understand their opinion, which will tap into a complete understanding of sales force Automation effectiveness which is going beyond the traditional sales force practices and a need for today's retail outlet. Percentage analysis has been used in this study to analyse the primary data collected via structured questionnaire and depth interview. The result shows, that using SFA technology in retail industry has achieved all of its expected outcomes as indicated by responses of sales managers and sales executives who were totally appreciating this technology and its key benefits. The research will also highlight some improvements and limitation, found during the survey.

Keywords: Sales Force Automation, Customer Relationship Management, Retail Industry.

Introduction

Automation is like the fabled king Midas, whose touch could turn everything into gold. All the industries that have embraced automation, changed beyond recognition. In the retail industry, the changes are visible. Automation is bringing new trends to the retail industry and impacting retail touch points and retail tech. Consumers are benefiting from it and so can small businesses.

In today's world, so intense markets' competition sales managers are confronting unsurpassed pressures to maintain effective selling strategies [G. Wright, K. Fletcher, B. Donaldson, J.H. Lee], enforcing an additional burden on sales forces to create a competitive advantage [O. Boujena, W.J. Johnston, D.R. Merunka]. Consequently, most firms, in every industry, are closely observing the area of Information Technology (IT) and rushing to invest significant resources in Sales Force Automation (SFA) technology with the goal of improving sales performance and enhancing customer services [R. Cascio, B.J. Mariadoss, N. Mouri]. In spite of the fact that there is no conclusive definition for SFA technology, it can be regarded as the deployment of technology in the form of computer hardware, software, and telecommunication by sales personnel to automate selling and administration [N. Lingaiah, G. Pires, J. Stanton]. By definition, SFA technology seems to come up with momentous potentials [J. Guan, R.M. Barker, D.J. Faulds, S.F. Gohmann]. Order processing, order tracking, inventory control, customer management, sales performance evaluation [L. Koivula], and most importantly, speed of information flow and sharing [F. Buttle, L. Ang, R. Iriana] are just a few examples of the business areas an SFA system aims to improve by means of automation.

The technology enables companies to collect, store, analyse, distribute and use customer-related data for sales purposes. Customer-related data like this is the key to customer orientation and the development of long-term mutually beneficial relationships with customers [Lambe, C.J. and Spekman, R (1997)]. SFA software from solutions providers enables sales representatives and their managers to manage sales pipelines, track contacts and configure products, among many other things [Grönroos, C. (2000)].

Selling require a number of intensive tasks such as scheduling appointments, making visit reports, follow-ups and updating business opportunities. This gives rise to a significant gap between productive action plans and non-productive tasks. SFA solutions exactly pitches in to bridge this gap by automating multiple tasks. In addition, it enables sales forces to focus on generating more sales and growing revenues.

Companies like Westside, Big Bazar, Pantaloons, lifestyle, Reliance Fresh have successfully integrated SFA into their sales process. The retail outlets of these companies segment their customers into different category for more customize and responsive service through the customer information collected through SFA. A fast billing system of EPOS, good and easy grievance handling system which can be accessed through customer service desk and company website, Communication to existing customers through SMS and e-mails, information about ongoing offers and latest news about their nearest stores, membership card to avail benefits and to award points to the repeat customer, thank you and festive cards on special occasions are some of the CRM strategies the company retail outlet carry out by successfully streamlining the SFA to selling process.

Review of Literature

Service quality and customer satisfaction are key factors in the battle to obtain competitive advantage and customer retention. Customer satisfaction is the outcome of customer perception of the value received in a transaction or relationship, where value equals perceived service quality, as compared to the value expected from transactions or relationships with competing vendors (Blanchard and Galloway, 1994; Heskett et al., 1990; Zeithaml et al., 1990). In order to achieve customer satisfaction, it is important to recognize and anticipate customers' needs to be able to satisfy them. Enterprises which are able to rapidly understand and satisfy customers' needs, make greater profits than those which fail to understand and satisfy them (Barsky and Nash, 2003). Organizations must therefore, develop and manage a healthy and good customer relationship with all the entities they have to deal with.

Organisational efficiency can be improved by effectively using information technology and automating certain tasks. While marketing is among one of those departments which adopted information technology before other departments (McLeod & Rogers, 1982; Li et al., 2001), the utilisation of sales force automation (SFA) technologies is a more recent

phenomenon. SFA, as a technical innovation, has become very popular in the last decade (Blodgett, 1995; Schafer, 1997; Stein, 1998). It has been defined by Morgan and Inks (2001) as the use of information technology by the sales force in selling and administrative activities. SFA offers many potential benefits to the organisation as such as increases in sales effectiveness and efficiency, improved productivity, enhanced customer relations and customer satisfaction, to name a few (Morgan & Inks, 2001; Gondert, 1993; Speier & Venkatesh, 2002; Fisher, 1998).

All these scholars found the positive impact of SFA on the overall organisational performance, in general, and CRM in particular.

George K. Amoako, Emmanuel Arthur, Christiana Bandoh and Rachel KafuiKatah Department of Marketing, Central Business School Central University College, Tema, Ghana, conducted a study on GOLDEN TULIP hotel (accra-ghana), to determine the impact of effective customer relationship management (CRM) on repurchase. The study revealed that CRM has an impact on customer loyalty, practice of effective CRM in organisations leads to a long or short term financial impact, effective CRM leads to customer satisfaction

(African Journal of Marketing Management Vol. 4(1), pp. 17-29, January 2012)

Henry AmeyawDomfeh and William D. Hunsaker, School of Business Administration, Kyungpook National University, South Korea & Lawrence Yaw Kusi and Kwamena Minta Nyarku, Department of Marketing and Supply Chain Management, School of Business University of Cape Coast, Ghana conducted a study to assess the Impact of Sales Force Automation System on Quality Service Delivery and Sales Reporting among Micro and Small-Sized Enterprises in KumasiMetropolis in the Ashanti Region in Ghana. The study revealed that SFA applications significantly and positively predict variance in quality service delivery in the selling function of micro and small-sized enterprises (MSEs). There was also a statistically significant but moderate positive correlation between the use of SFA and quality service delivery. It was also established that the use of SFA applications significantly and positively predict variance in sales reporting in the selling function of MSEs. There was also a statistically significant high positive correlation between the use of SFA and sales reporting. (wseas transactions on business and economics Volume 15, 2018)

Betsy BuggHolloway, Brock School of Business, Samford University, Birmingham, Alabama, USA. George D. Deitz Department of Marketing & Supply Chain Management, University of Memphis, Memphis, Tennessee, USA. John D. Hansen Department of Marketing, Industrial Distribution and Economics, University of Alabama at Birmingham, Birmingham, Alabama, USA conducted a study on to two companies, the first was a privately held pharmaceutical company with operations in North America and Europe, whereas the second was a global publishing conglomerate, to determine the

benefits of Sales Force Automation (SFA) through empirical examination of SFA Usage on Relationship Quality and Performance. The study revealed that the perceived ease of use of the SFA system positively influences SFA usage, and as expected salesperson experience moderates this relationship so that the relationship between ease of use and SFA usage becomes significantly stronger as salesperson experience increases. SFA usage has a positive influence on the processing of market information (i.e., salesperson learning), which then positively influences both customer orientation and relationship quality. (Journal of Relationship Marketing, 12:223–242, 2013)

Michael Ahearne, Eli Jones, Bauer College of Business, University of Houston, Houston, Texas. Adam Rapp College of Business Administration, Kent State University, Kent, Ohio. John Mathieu, Department of Management, University of Connecticut, Storrs, Connecticut conducted a study on pharmaceutical industry to determine the impact of Salesperson Technology Usage on Customer Satisfaction and Sales Performance. The study revealed that overall usage of SFA tools can have a significant influence on salespeople's adaptability to customers' needs and salespeople's ability to better serve customers—two consequences that enhance salesperson performance. This is important because it helps managers persuade their salespeople to use technology more during the sales process. Moreover, it is evident that the use of technology can lead to several positive outcomes for salespeople. Because sales departments' priorities have moved to improving relationships and improving the quality and uniqueness of the sales presentation (Rivers and Dart 1999), technology may be a viable option in this regard. (Management Science Vol. 54, No. 4, April 2008)

Muhammad Tahir Jan, Azura Omar, Osman M. Zain, Kalthom Abdullah Faculty of Economics and Management Sciences KENMS, International Islamic University Malaysia IIUM conducted a study on a roadmap for CRM success: in light of the technology critical success factors (CSFS). The objective of the study was to develop a conceptual framework that depicts the impact of technology related critical success factors (CSFs) on customer relationship management (CRM) success namely customer satisfaction. (JM International Journal March, 2011, Vol 1)

Objective of the Study

1. To evaluate SFA effectiveness on Customer Relationship Management.
2. To determine the experience and perspective of the Retail Stores Sales Manager towards SFA.
3. To determine the expectation and perception of the Sales Executive towards the usefulness of SFA
4. To determine the satisfaction level of the key users of SFA technology

Research Methodology

A descriptive survey design methodology and depth interview was adopted. Both primary and secondary data were used as a source of data for the

research. Since the objectives were focused on primary data, the study relied more on the primary data. Data was collected using a questionnaire and depth interview. The questionnaire was designed to encourage good response from busy respondents and Depth Interview helped to explore the perspective of the respondents towards SFA. The company website and promotional materials were used as guide for the questionnaire design. The study was carried out among the sales manager and sales executive of Big Bazar, Pantaloons, lifestyle, Westside, Reliance Fresh located in Pune. We, first, adopted a qualitative approach to interview fifteen sales managers; three manager from three retail outlets of each firm. Sales managers in each firm were contacted by telephone and informed of the purpose of the study. All participants were informed that their responses would be confidential and solely used for academic purposes. The aim of conducting a depth interview was to find out respondent's point of view, experiences, feelings, and perspectives towards SFA as tool for 1) providing better customer service and management 2) providing accurate and relevant information 3) lowering administrative work load. After conducting these interviews, a quantitative approach was followed to solicit quantitative data via close-ended questionnaires from 100 sales people; 20 sales executive from three retail outlet of each firm. Questionnaires were decided upon since they fit better with the study purposes in comparison to other instruments. Specifically, they ensure a high rate of response specially when they are distributed and collected in person, they are less expensive and easier to administer, and, among others, they assure confidentiality. The questionnaires comprised close-ended questions using the Likert scale. This mode of preference indication was deemed the most preferable and the most common as compared to other modes of scales. The Likert scale was easy to construct and could be easily understood by the respondents. It allowed the respondents a sufficient range of choices when answering the questions, thus enabling the collection more accurate information particularly from the non-experts of technical terms such as sales executive. After filled questionnaires were returned, the responses were edited to ensure completeness, consistency and readability.

The questions in the questionnaire for the sales people were divided into two parts: part one consisted of question to check usefulness of SFA to them in terms of increasing their productivity; part two consisted of questions to analyse their opinion and satisfaction with SFA technology. The data was analysed and interpreted using percentage distribution.

Data Analysis and Interpretation

Data collected through intensive interview of fifteen (15) sales manager from five firms; three from different retail outlet of each firm located in Pune; revealed the following results towards SFA Technology:

SFA towards Customer Service Management

75% of the Sales manager reward their loyal customers and repeat purchasers through any offers

or adding points to their membership card, because majority of the revenue comes from their loyal customers. They track purchase history of loyal customers and repeat purchasers through SFA Technology. 25% of the sales manager do not always reward their repeat purchaser because they don't always streamline their SFA technology with selling process.

70% of the sales manager use customer contact database which is accessible to them through SFA Technology, to inform all the customers about the offers and promotional event through SMS or mail. 30% of the sales manager use other media sources such as newspaper and pamphlets as their promotional tool.

80% of the sales manager believe that triggering SMS or mail to wish the customer on their special occasion like birthdays and anniversaries would make them feel special and valued, which is done by automation SFA. Remaining 20% of the respondent focus more on selling than relationship building so they sometimes do not give more importance to these customized service.

65% of the sales manager track the purchasing pattern of the customers through data available by SFA technology this allows them to bifurcate the customers into loyal and repeat purchaser and accordingly customizing services to them. This also helps them to identify and get in touch with potential customer who has become inactive. 35% of the remaining respondent face complicated procedures and require skilled or trained people so are unsuccessful in streamlining the process with SFA Technology.

80% of the sales manager believe that triggering SMS or mail regarding any achievement or recognition the company has got, will encourage and enhance trust and believe of the customer in the company. Remaining 20% of the respondent does inform but through pamphlets and not through customize service.

85% of the sales manager believe that thanking gesture for customer visit or shopping from the particular outlet through mail or SMS gives them a sense of belongingness hence they will relate more to the particular outlet whereas remaining 15% conduct this welcome and thanking strategy through their responsive Salesforce in the outlet instead of customizing it.

SFA towards providing Accurate and Relevant Information

70% of the sales manager subordinates are prompt at attending and solving customer complain since they have access to centralized repository of each client's information captured and stored through SFA Technology. 20% of the respondent's subordinate are incapable to access and use the information due to lack of expertise, experience and training.

75% of sales manager successfully assign leads to various salespersons for equal task distribution since automation technology updated them on-time with accurate information about sales activities this enhance sales decision-making, such

as better resources allocation and ranking of customer orders priorities, which should in turn be transmitted into higher sales rates. 15% of the remaining respondent are incapable to interpret these information due to lack of expertise, experience and training.

SFA towards Lowering Administrative Work load

85% of sales manager have accepted and realised that SFA technology use have impacted their performance positively by reducing their time in terms of less of the manual and paper work by standardizing sales reporting forms and, therefore there efficiency when having more time for reading and analysing sales data. 15% of the remaining respondent still follow manual and paper work sometimes when there is a lack of expertise.

70% of sales manager claims that technological change like SFA in a firm is a boon because the company should undergo such change due to intense competition in retail industry. 30% of the remaining respondents though realised the benefits of automation and standardization are reluctant to such changes due to lack of expertise and thus fear of job loss.

Data collected through questionnaire from hundred (100) sales executive from five firms; twentysales executive from three different retail outlet of each firm located in Pune; revealed the following results (perspective towards SFA Technology)

Usefulness of SFA to them in terms of increasing their productivity

Table 1: SFA software is to get the right data to the right people at the right time

S.No	Particulars	No.of Respondents	%of Respondent
1.	Strongly agree	60	60%
2.	Agree	25	25%
3.	Neither agree nor disagree	15	15%
4.	Disagree	0	0%
5.	Strongly disagree	0	0%
	Total	100	100%

Source: Primary Data

Interpretation

60% of the sales executive strongly agreed that SFA software gives them accurate information about the product and the customers whenever needed. 25% of the respondent just agreed to the statement. 15% of the respondent have a neutral opinion to the statement. The figures shows that SFA provides right information to the sales executive about the products they sell, the customers they serve, the volume and the quality of market information they need at the right time.

Table 2: SFA systems automate time-consuming, but important, tasks such as scheduling sales appointments, sending follow-up letters and emails, tracking contacts and updating sale opportunities

S.No	Particulars	No.of Respondents	%of Respondent
1.	Strongly agree	75	75%
2.	Agree	10	10%
3.	Neither agree nor disagree	15	15%
4.	Disagree	0	0%
5.	Strongly disagree	0	0%
Total		100	100%

Source: Primary Data

Interpretation

75% of respondent strongly agree with the statement. 15% of the respondent have neutral opinion on the statement. The figure clearly indicate that SFA lowers the field work as well as the administrative work of the sales executive by scheduling sales appointments, sending follow-up letters and emails, tracking contacts and updating sale opportunities.

Table 3: The sales team has Immediate Access to Order Information, and can proactively alert customers to an Order's Arrival or delay through automation

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	45	45%
2.	Agree	45	45%
3.	Neither agree nor disagree	5	5%
4.	Disagree	15	15%
5.	Strongly disagree	0	0%
Total		100	100%

Source: Primary Data

Interpretation

45% of the respondent strongly agree that through automation they can proactively alert customers to an order's arrival or delay. 45% of the respondent just agree to the statement. 15% disagree with the statement. The figure clearly indicates that majority of the sales executive have immediate access to SFA and can update the customer with relevant information through automation. This makes them more competent.

Table 4: SFA relieves salespeople up from mundane support chores empowers them to make more sales calls, be they in-person or over the phone

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	40	40%
2.	Agree	30	30%
3.	Neither agree nor disagree	10	10%
4.	Disagree	20	20%
5.	Strongly	0	0%

	disagree		
	Total	100	100%

Source: Primary Data

Interpretation:

40% of the respondent strongly agreed that SFA relieves sales executive up from mundane support chores empowers them to make more sales calls, be they in-person or over the phone. 30% of the respondent agreed and 20% disagreed with the statement. The figure clearly indicate that SFA increases the productivity of the sales executives by lowering the dull, tedious, monotonous routine support task so that they can concentrate more on their core services.

To analyse their opinion and satisfaction with SFA technology

Table 5: Sales automation software also empower executives to create more accurate sales forecasts based on real-time figures

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	85	85%
2.	Agree	15	15%
3.	Neither agree nor disagree	0	0%
4.	Disagree	0	0%
5.	Strongly disagree	0	0%
Total		100	100%

Source: Primary Data

Interpretation

85% of the respondent strongly agreed that automation software also empowers them to create more accurate sales forecasts based on real-time figures. This figure clearly indicate that SFA technology make them more competent in terms of forecasting sales.

Table 6: Training is a frequently under-planned and under-invested effort in SFA software implementations

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	30	30%
2.	Agree	40	40%
3.	Neither agree nor disagree	0	0%
4.	Disagree	20	20%
5.	Strongly disagree	10	10%
Total		100	100%

Source: Primary Data

Interpretation

30% of the respondent strongly agreed that Training is a frequently under-planned and under-invested effort in SFA software implementations. 40% of the respondent agreed whereas 20% of the respondent disagreed with the statement. The figure clearly indicate that training is a critical issue for majority of the respondent.

Table 7: SFA Implementation Is Difficult For Less Skilled

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	85	85%
2.	Agree	15	15%
3.	Neither agree nor disagree	0	0%
4.	Disagree	0	0%
5.	Strongly disagree	0	0%
	Total	100	100%

Source: Primary Data

Interpretation:

85% of the respondent strongly agreed that SFA implementation is difficult for less skilled and average experienced sales people. The figure clearly indicates that successful implementation and streamlining SFA effectively with the selling process require skilled people or people with good experience of working on SFA tool or training the people on SFA tool is the solution for less skilled salespeople.

Table 8: SFA is all about going Beyond Traditional Selling Activity, Which Is A Need In Intense Competitive Retail Industry

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	10	10%
2.	Agree	70	70%
3.	Neither agree nor disagree	15	15%
4.	Disagree	0	0%
5.	Strongly disagree	0	0%
	Total	100	100%

Source: Primary Data

Interpretation

75% of the respondent agreed that SFA is a need in intense competitive retail industry.15% of the respondent have neutral opinion to the statement. The figure clearly indicate that respondent have accepted and realised the benefits associated with automation and standardization.

Table 9: Training in SFA Implementation and Use is a must

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	30	30%
2.	Agree	40	40%
3.	Neither agree nor disagree	0	0%
4.	Disagree	30	30%
5.	Strongly disagree	0	0%
	Total	100	100%

Source: Primary Data

Interpretation:

30% of the respondent strongly agreed and 40% of the respondent just agreed that training is necessary in SFA implementation. 30% of the

respondent disagreed with the statement. The figure clearly indicate that IT implementation depends on the end-user adoption which in-turn depends on how comfortable they are using the system hence time to time whenever needed training is a must.

Table 10: SFA Technology Use Impact Sales Executive Performance Positively Thus Making Them More Competent

S.No	Particulars	No.of Respondents	% of Respondent
1.	Strongly agree	35	35%
2.	Agree	40	40%
3.	Neither agree nor disagree	5	5%
4.	Disagree	30	30%
5.	Strongly disagree	0	0%
	Total	100	100%

Source: Primary Data

Interpretation:

40% of the respondent agreed that use of automation and standardization impact their performance positively thus making them more competent. 35% strongly agreed to the statement. 30% of the respondent disagreed to the statement. The figure clearly indicate that automation has impacted the performance of the respondent positively.

Conclusion and Recommendation

1. The study distinguishes among the different impacts of SFA based on the users who utilize this technology; each is expected to have different points of interest accordingly.
2. Sale managers were assumed as key makers of the decision to invest in SFA technology so their feedback is critical for our evaluation.
3. The SFA technology was considered an added value tool when it results in a less administrative work, accessibility for accurate-relevant sales information, customer service and management.
4. With respect to these areas of investigation, the analysis of depth interview conducted with sales managers clearly indicates that sales managers are better off with SFA technology.
5. The profitability and revenue generation of a firms is highly dependent on the effectiveness of their salespersons, one of the benefits of SFA technology is to enhance a salesperson's performance.
6. Apart from other benefits, the analysis of sales executive questionnaire results reveals that by using SFA technology, the sale executive found extra time for selling thus increasing their productivity.
7. Adding to sales executive competence entails optimizing SFA to increase the sales executive knowledge about the products they sell, the customers they serve, the volume and the quality of market information they need. One approach to have informed sales executive is to grant them the privilege to access up-to-the-minute information regardless of location and time. The accuracy of information and reporting is also a necessary input in a sales executive competency

and is considered one of the key factors to encourage investments in SFA technology.

8. Almost every business have realized the importance and effectiveness of SFA in CRM all they need to do is to integrate SFA to their selling process and Customer Relationship Management process effectively and efficiently.
9. Effective and efficient implementation demands training in the technology.
10. Due to lack in training sales executive could not streamline SFA technology and sales process and hence could not customize the service for customer management.
11. Success of an IT implementation depends on the end-user adoption which in-turn depends on how comfortable they are using the system. It's very important to train the end users thoroughly and train them often to develop that comfort factor. Training the sales executive on automation and standardization is of utmost importance.
12. Few Sales managers are reluctant to new technology and adapt to new situation because of lack of expertise so training and mentoring is must. This type of technological change in the organization may create issue among the sales manager hence they may be demotivated. So successful integration of SFA to traditional selling process demands training.
13. Here the researcher finds that in today's era SFA is a must concept mastering every retail industry. This study has implications for sales management practitioners into retail business or other related industry who plan to introduce SFA technology in their firms could utilize the finding of this study to know what this technology actually renders in the field and how to start thinking about more advanced benefits than the standard achieved ones
14. Since the study findings will give a better understanding of sales manager and sales executive feelings, expectations and opinion towards SFA and would also suggest the areas of improvement under SFA so that managers can accordingly implement effective and user friendly SFA for building strong and healthy relationship with the customer and improving the productivity of salespeople.

Limitations

The customer is the foundation of any business' success. Considering customer importance at all stages of the sales and marketing process helps the company to ensure greater customer satisfaction and increase its long-term goal of repeat business. Thus customer equally shares the service experience, which was neglected in the study. It's equally important to understand customer's experience regarding the impact of sales force automation and quality service delivery.

Suggestion for Further Study

Further studies need to be carried out to analyse the impact of SFA technology in better communication and quality service delivery from customer's perspective.

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