

The Pennsylvania State University

The Graduate School

**EXPLORATION OF SALESPERSON COMPETENCIES FOR CUSTOMER
ENGAGEMENT IN SELECTED HOME IMPROVEMENT RETAIL
ORGANIZATIONS IN THE USA**

Dissertation in

Workforce Education and Development

by

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Submitted in Partial Fulfillment
of the Requirements
for the Degree of

Doctor of Philosophy

May 2024

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ABSTRACT

This study aimed to create and critically evaluate a comprehensive, systematic, and rigorous multimethod approach for developing a competency inventory for retail salespersons in the USA's home improvement industry. A prospective naturalistic inquiry methodology with a pragmatic inductive analysis approach was employed, chosen for its suitability to the exploratory nature of the research. This methodology afforded considerable flexibility, allowing adjustments to the study design based on emerging data. The research utilized a modified Delphi technique, starting with an instrument initially crafted from a literature review and environmental scanning.

The development of the competency inventory involved a three-phase process: construction, deconstruction, and reconstruction. The construction phase encompassed data and information collection throughout the project, from inception to the final iteration of the modified Delphi technique. During these phases, 269 competency codes were identified from qualitative data gathered from the expert panel of salespeople through thematic open coding. These were refined into 57 competencies grouped into 11 overarching clusters. In the third iteration, customers in the home improvement retail industry evaluated these competencies using a 5-level Likert Scale (1 representing 'not important' to 5 'most important'). The study provided a final list of competencies in 11 clusters through mean comparison analysis and factor analysis, offering insights into the potential future evolution of these competencies.

The study acknowledges the significant shifts in retail organizations, reflecting retail trade's historical evolution and advancements. The role of the salesperson remains

constant, but the required skills, knowledge, attitudes, behaviors, and other competencies are evolving in response to changing customer demands and retail infrastructure shifts.

With the increasing importance of 'customer engagement' in a world influenced by reviews and social connectedness, this research focused on evaluating and enhancing the cognitive competencies of salespeople, often overlooked yet crucial for customer engagement in retail stores.

Viewing competencies as a system serves a dual purpose. Organizations should leverage these competencies to develop tailored models for competency-based training, hiring, and performance management. The findings highlight an urgent need for upskilling and reskilling retail personnel to meet the dynamic demands of the sector, significantly influenced by technological advancements and shifting consumer behaviors. This research contributes to formulating competency models that can inform training and development initiatives in the retail industry.

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ACKNOWLEDGEMENTS

I stand with a heart brimming with gratitude for the myriad of individuals who have supported me through my transformative journey. As I reflect, I hold a special moment in my heart for my late father, whose absence was felt acutely, as he passed away a day before my qualifier exam. I am enveloped by the warmth of his pride and smile from afar. My deepest thanks go to my wife, Tanjima Alam. Her unwavering belief in me fortified my resolve when I stepped away from a secure professional life to embark on the arduous path of academia. Her support was the bedrock on which I stood during my toughest decisions. I owe a great debt to my father-in-law, Fakhrul Alam, whose contributions to my journey are invaluable. His support has been a cornerstone of my achievements.

My mentor, Dr. Mark Johnson, deserves immense gratitude for guiding me to the doors of Pennsylvania State University. It was here that I met Dr. Mark Threeton, my advisor, whose influence has been life-altering. Under his guidance, I have not only achieved academic success but have also learned resilience, perseverance, and strategy.

I am profoundly grateful to Dr. William J Rothwell, a luminary in competency modeling and author of many books. The last three years working as his graduate assistant have been my life's most enriching educational experience. His mentorship is something I could aspire to for a lifetime.

I want to thank Dr. Wesley Donahue for the abundant growth opportunities and sage advice. I also thank Dr. Rama Radhakrishna, who was instrumental in the early development of my knowledge and whose support was pivotal in designing my study.

A special acknowledgment is reserved for Dr. Aileen Zaballero, who was a constant source of wisdom and support through each step of my learning and research. Her unconditional support has been a guiding light. I am also thankful to WEGSA and all the students whose support was a haven during challenging times. My friend Dr. Issa Al Balushi deserves a mention for being ever-present and imparting lessons that extend beyond the academic sphere. To my friend and spiritual guide, Dr. Israa Samarin, thank you for illuminating the path just ahead of me and for your unfailing support. My gratitude extends to Dr. Michele Welliver for her invaluable support in my research endeavors.

I would also like to express my gratitude to my mentor, Dr. Leila Farzam, who has been my beacon whenever personal and professional growth beckoned. To Dr. Nasim Imtiaz Khan, your trust and support from the very beginning have been a source of strength. The Bangladesh Student Association holds a special place in my heart, a reminder of shared heritage and unwavering camaraderie.

On a personal note, my brother Fatin deserves thanks for ensuring I always had the books I needed. My brothers from another mother Niloy and Nishad Vai taught me invaluable life lessons during my turbulent teenage years, shaping the man I am today.

And finally, to my Late grandfather-in-law, Apollo Mama, Mami, your contributions have been fundamental to our lives.

My journey is a tapestry woven from the threads of all these relationships, each a crucial piece that has brought me to where I stand today.

Chapter 1 Introduction

Traditional brick-and-mortar retailers are navigating an increasingly competitive landscape, heavily influenced by the rise of online retailers claiming an increasing amount of market share. In the digitally controlled era, the evolution of skilled salespeople's role is marked by transformed marketing and sales practices, driven by increased access to information, faster transaction speeds, and the need to navigate a diverse and complex array of customer stakeholders, all contributing to an ecosystem that heavily relies on the frontline personnel's ability to deliver superior value to customers (Kumar et al., 2017; Peterson et al., 2021). They are now, more than ever, instrumental in helping retailers differentiate themselves, creating distinct identities that set them apart from both online competitors and other traditional retailers (Cross et al., 2007; Cuevas, 2018; Marshall et al., 2012). This shift is part of a broader, long-term transformation pattern within the retail industry, a sector that has evolved from ancient civilization to today's sophisticated digital marketplace.

By 800 BC, the concept of markets had been established in ancient Greece, laying the groundwork for organized commerce. Retail's roots can be traced back to 9000 BC when primitive trade and bartering started with exchanging cows and sheep. The late 19th century stipulated significant developments that propelled the retail sector into its modern form, marked by many noteworthy milestones, including the advent of the cash register and the advent of cataloging.

The emergence of computers and the internet in the 1990s marked the beginning of a new retailing epoch, further revolutionized in the 2000s when mobile technology was

invented and popularized in retail. The widespread adoption of cell phones and their integration into the shopping process with the internet blurred the lines between physical and online stores, offering consumers unprecedented convenience in shopping (Diaz, 2019; Meyers, 2019). This shift prompted retailers to reconsider their strategies, leading to an integration of online and offline shopping experiences. Today, customers can effortlessly browse products from any location and place orders for home delivery, a testament to the seamless integration of digital and physical retail channels. These advancements denoted the shift towards the present-day retail period and indicated the commencement of a more methodical strategy for marketing goods and services. Over the past two decades, there have been noticeable changes in the retail industry. These changes can be attributed to two influential factors: the expectation that retail sales will move to online platforms, leading to the decline of physical stores, and the preference of consumers for large-scale clubs and supercenters (Herjanto & Franklin, 2019; Hortaçsu & Syverson, 2015).

The Fourth Industrial Revolution, characterized by breakthroughs in information technology, is set to transform the retail sector further. By 2025, many businesses are expected to realign their strategic priorities to incorporate advanced machine learning and algorithmic capabilities (World Economic Forum, 2020). Concurrently, social media platforms have emerged as vital arenas for business promotion. Platforms like Facebook, Twitter, and Instagram offer retailers exceptional access to a global audience, with 97% of businesses leveraging these platforms for marketing and customer engagement in 2020 (Statista, 2022). Despite these advancements, the rise of e-commerce has had a

significant impact on traditional retail models, as evidenced by the increase in retail bankruptcies in recent years (CBI Insights, 2022; Hortaçsu & Syverson, 2015).

The retail industry, having evolved from the barter system to the creation of sprawling big-box stores, now faces new challenges in the wake of the COVID-19 global epidemic. Retail executives are grappling with attracting customers back to physical stores while adapting to shifts in consumer behavior and expectations. Understanding and responding to these evolving trends is crucial for the survival and growth of the retail sector.

On the other hand, salespeople, who were once regarded as product specialists, have now become pivotal in driving retail success being on the front line with the customers (Cuevas, 2018). The adoption of Taylorism in department stores transformed the retail landscape by segmenting jobs into specialized tasks. This approach, coupled with the mechanization brought about by the Industrial Revolution, exemplified by the introduction of the mechanical cash register—revolutionized retail operations, automating numerous functions and enabling stores to serve a larger customer base more efficiently.

In this rapidly changing landscape, salespeople are more important than ever. Their role has expanded beyond traditional selling to include navigating the complexities of e-commerce, automation, and changing consumer trends (Sadique, 2020). Since they stand at the forefront of this retail evolution, salespeople are not just representatives of their stores but are becoming key players in shaping the future of retail.

The retail landscape continues to evolve, and the roles of salespeople within organizations are expanding to adapt to these changes. The significance of a salesperson's role is often misunderstood and undervalued in the retail business. “Organizations largely provide a collection of resources and support activities for their salespeople; however, the mere collection of resources directed at salespeople does not automatically transform into a coordinated, cohesive, synergistic, and evolving system needed to work with rapidly evolving customers”, a strong, provocative statement by Peterson et al. (2021, p. 542). Since a customer primarily interacts with a salesperson, not with the CEO or operation managers, this interaction influences the customer’s perception of the brand. within the first 7 to 10 seconds of interaction, often without a second opportunity. The interaction requires an intense amount of preparation, practice, and training to be successful (Gibbons, 2018; The Center of Sales Strategy, 2023). An organization’s integrity and value for customers have been disseminated through frontline salespersons' behavior since salespersons are the customers' primary contact, and the executives stress various approaches to improve sales and service operations (Rapp et al., 2015).

In 2014, the value added per employee in the non-farm category was \$124,000, while in retail, it was half of that amount, about \$66,000, according to the Bureau of Labor Statistics (U.S. Bureau of Labor Statistics, 2014). In 2023, according to the U.S. Bureau of Labor Statistics (2023) economic news release, the retail salesperson is the largest occupation, with 3.6 million people (about twice the population of Nebraska) currently working, with below-average wages (\$34,730). Consumer-related firms face significant opportunities and risks due to evolving consumer expectations and habits and

the expansion of e-commerce. With the evolving roles of retailers, the functions of salesforces are also changing to meet the new business demands. The National Center for O*NET Development (2022) states that traditional sales roles include greeting customers, recommending products, computing purchases, preparing merchandise, and maintaining knowledge of promotions. A closer examination of these job functions reveals that salespersons' duties are often perceived as limited to customer interactions within the store. This study delves into the competencies required for each activity and how required skills, behavior, attitude, and other job-related functions can be identified based on the dynamics of the role emerge. In a competency-based human resource system, the salesperson's capacity to add value to the organization increases as they perform better through upskilling and reskilling.

Another significant shift can be observed through the rise of influencers. Traditionally, the salesperson in stores played a crucial role in influencing purchase decisions by presenting and explaining various products and their unique features. Now, social media influencers serve as new-age marketers, promoting products on various platforms while also entertaining their audiences. DIY project video creators on the internet have educated customers, allowing them to make informed decisions based on online peer reviews. The widespread use of social media ensures that products are easily accessible with a few clicks, and customers are continually exposed to information for each purchasing decision through various entertaining means. There is a clear distinction between a salesperson's traditional role of making the product available and retail

establishments' requirement to engage customers in-store in this new era of retail evolution.

Historical sales research primarily focused on areas such as recruitment, motivation, compensation, and sales organization structure, frequently overlooking the evolving dynamics within sales organizations, the effects on sales teams, and the implications of adopting sales automation technologies (Sheth & Sharma, 2008). With the rise of Generation Y and Generation Z, new challenges and opportunities have surfaced for retail establishments. These younger demographic groups, increasingly influential in dictating consumer trends, show a distinct preference for visiting physical stores, a behavior that is extensively reflected on various social media platforms (Criteo, 2018). Notably, the Criteo report underscores that Generation Z, representing 23% of the US populace, places high value on in-person shopping experiences, particularly for specific types of products and marketing methods.

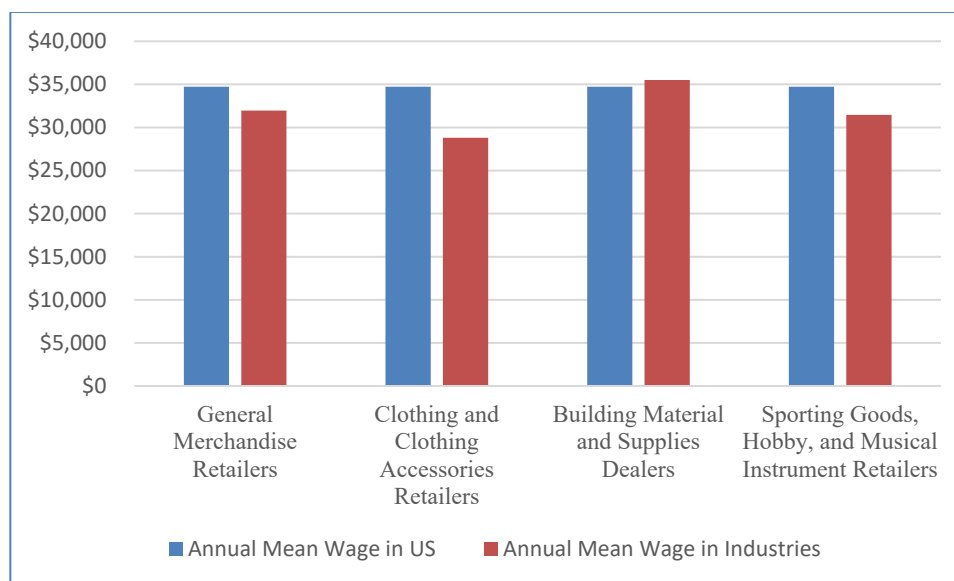
In this evolving landscape, the role of the salesperson is being redefined. Beyond merely facilitating product availability, salespersons are now expected to engage proactively with customers in-store. Such a shift underscores the need for better coordination and in-depth training, emphasizing a comprehensive understanding of the retail ecosystem. The initial step in adapting to this change involves grasping the changing market demands for retail salespeople and preparing for how this role will evolve in the years to come.

It's crucial to recognize the variations in job structures and pay scales across different industries, especially for retail salespersons. The U.S. Bureau of Labor Statistics

(2023) data reveals significant differences in average salaries between retail salespersons and those in the top four industries. This disparity (figure 1-1) highlights the potential benefits that retail salespersons could gain from upskilling and transitioning to other industries. Such a move could offer them opportunities for better remuneration and improved living standards. Understanding these industry differences is key to making informed career decisions.

Figure 1-1

Comparison of Wage Between average US wage vs Industries



It's evident from the graph the job is broadly categorized as a salesperson, yet there is a difference based on the industry. Specifically, building materials and supplies dealers are above average salaries with an estimated \$35,340 salesperson in this industry

(U.S. Bureau of Labor Statistics, 2023). According to the IBISWorld (2023) report, building material and garden equipment and supplies dealers include home improvement stores (job identification no. 44411), paint stores (job identification no. 44412), hardware stores (job identification no. 44413), lumber and building material stores (job identification no. 44419), lawn and outdoor equipment stores (job identification no. 44421) and nursery and garden stores (job identification no. 44422).

Retail success in the US is hinged on cultivating robust relationships with consumers, who often value the in-store experience over economic hindrances such as high product prices. Consequently, the role of employees, particularly in delivering exceptional customer service and possessing thorough product knowledge, is vital for outshining competitors (IBISWorld, 2023). The transition from Showrooming to Webrooming in retail marks a pivotal change, demanding enhanced coordination and extensive training for salespersons from a holistic system perspective. Identifying the evolving market needs for retail salespeople and forecasting the future progression of this role are critical initial steps in this transition.

Customer engagement contributes to four key areas: customer lifetime value, customer referral value, customer influencer value, and customer knowledge value (Kumar et al., 2010). Salespeople are pivotal in adding value to retail firms through direct customer interactions, a crucial element of customer engagement. However, there has been a noticeable gap in focusing on the required competencies of salespeople and evaluating the impact of their performance, which is a core discussion in the literature

review chapter. As the primary interface between the company and its customers, salespersons often represent the face of the organization. The perception and value customers attach to a retail organization are significantly influenced by their interactions with sales staff. Therefore, it is essential for both researchers and retail organizations to pay more attention to salespersons, especially considering the importance of customer engagement and its impact on customer experiences in these challenging times. Their roles are frequently undervalued, which is clearly shown by statistics, and they are among the lowest-paid positions. Addressing the importance of salesperson competencies and exploring the competencies required to successfully perform their job in the current market and in the future are crucial for gaining a strategic edge in the competition and preparing the workforce for upcoming challenges in the evolving retail sector.

At the micro-level, the strategies surrounding salespeople within an organization demand thorough investigation and understanding. These strategies are pivotal in driving customer engagement, which, in turn, has considerable macro-level economic repercussions. In the 1990s, the focus was predominantly on value-driven metrics like transaction frequency and profitability in customer data analysis. However, in the 2000s, there was a paradigm shift in business strategies. Companies began transitioning from a transactional approach to one centered on relationship marketing, cultivating trust, commitment, and customer loyalty (Pansari & Kumar, 2018).

In the current competitive landscape, businesses are intensely concentrating on catering to customer needs and preferences. Their goal is not just to meet these needs but to exceed them, thereby securing their position as the preferred choice for consumers

through the provision of exceptionally positive emotional experiences. This shift aligns with the changing expectations of customers and the evolving role of retail salesforces, which are now more focused than ever on meeting these dynamic market demands.

Today's retail sales force, which comprises roughly four million individuals, faces the urgent need to adapt to these changing expectations. Reskilling and upskilling of this workforce have become essential components for fostering organizational growth, primarily through enhanced customer engagement. However, a significant gap exists in the thorough analysis of the competencies and behavioral indicators of salespersons, especially in sectors like home improvement and other industry-specific sales roles (Herjanto & Franklin, 2019). This lack of detailed competency analysis presents a considerable challenge for training developers aiming to create effective programs. Without a clear understanding of the measurable and observable behaviors that align with customer engagement in-store, optimizing skill development remains a daunting task. This gap can potentially impede business success since the effectiveness of sales strategies is directly linked to the proficiency and adaptability of the salesforce.

In addressing these challenges, this study will delve into the problem statement, research questions, and the significance of the study. An initial conceptual model will be introduced, aiming to advance the competencies of salespersons as required by contemporary retail organizations. This model will explore the necessary background of the retail workforce, the competencies needed for successful customer engagement, and the urgency of such competency explorations. The dissertation will tackle specific issues and research questions, providing a detailed explanation of the conceptual model. The

focus will be on how these competencies can be effectively developed and integrated into the current retail environment, considering the nuanced requirements of different retail sectors, including home improvement. By doing so, the study aims to contribute valuable insights into the field of retail sales, offering practical solutions for enhancing the skills and capabilities of the sales workforce in today's rapidly evolving market landscape.

Background

The decline of department stores, often attributed to the rise of the internet and e-commerce, has sparked debate over the real causes of physical retail underperformance (Hortaçsu & Syverson, 2015). Despite e-commerce constituting only about a tenth of total retail spending in the U.S. (U.S. Department of Commerce, 2022), its impact seems disproportionately large in the retail industry. Retail analyst Neil Saunders' survey of 2,700 shoppers in 2017 points to various factors, including service quality, store ambiance, and overall shopping experience, as significant contributors to this trend beyond the straightforward narrative of shifting to online shopping experiences in recent times. The year 2017 was before the COVID-19 pandemic started shifting the market through social distancing, creating an annual sale surge for online stores due to the requirements of social distancing in public (Brewster, 2022)

While online giants like Amazon and eBay have been blamed for the downturn of traditional retail, this shift also highlights the unique advantages of physical stores, especially in customer engagement. The lack of direct human interaction in online

transactions poses challenges in cultivating customer loyalty and a sense of belonging, where artificial intelligence and automation have a minimal capacity to improve customer engagement. Despite the growing online market, recent trends indicate a renewed interest in physical retail spaces. Amazon, for instance, is opening a large store in Los Angeles to enhance the shopping experience, signaling a shift back to brick-and-mortar approaches. Similarly, companies like Toys R Us and Hertz are reviving their physical presence post-bankruptcy. Retailers like Ulta Beauty and Sephora are expanding their physical stores presence, focusing heavily on customer service. This trend suggests that proximity to customers and quality engagement remain crucial, potentially gaining more importance over time.

Artificial intelligence, automation, machine learning, and big data analysis are a few functions that give online businesses a great start, but behavioral abilities will still be crucial to enable salespeople to retain clients and offer value through a developing relationship. The salespersons can add the most value to the firm by earning client trust, loyalty, and word of mouth. Salespeople are the face of every brand's retail operation and consistently make a difference by providing outstanding customer service. The service performance measurement directly impacts satisfaction, perceived value, and behavioral intentions, which are still a significant concern for research in the retail sector (Blut et al., 2018; Meesala & Paul, 2018; Souiden et al., 2019). According to the U.S. Bureau of Labor Statistics (2019), the job opportunities for retail-sales-related occupations will decrease by around 50,000 by the next decade, particularly the number of people from the direct sales approach. The impact of the latest epidemic has resulted in a significant fall

in salespeople due to their lack of interest and also to the closing of multiple stores. There are different perspectives; some salespeople are in the exit phase and have unique sales talents, but some have been laid off due to a lack of customers during the pandemic. Upskilling and reskilling the group of salespersons can create value for an organization and a new career opportunity for the individual in industries where more opportunities are available. It is not practical to invest in salesperson development without a proper understanding of what is needed to successfully engage customers and add practical value to the organization, which automation cannot quickly replace. For example, using cognitive and interpersonal skills to engage customers at the store requires a significant set of competencies, but what are the behavioral indicators they need to master? As corporations invest billions in artificial intelligence to compete, stakeholders must consider the next chapter of retail, where human interaction will be a crucial part of any transaction and long-term benefit.

While the number of retail salesperson jobs is increasing, salespeople remain among the lowest-paid employees. This disparity is evident in labor productivity comparisons; for instance, in 2014, labor compensation in the retail sector was approximately \$35,000, significantly lower than the \$65,000 average in the broader non-farm economy (Hortaçsu & Syverson, 2015). Internet retailers often offer roles with lower pay and fewer benefits. The surge in e-commerce, particularly a 40% increase in 2020, has led to new store activities, including non-sales-related tasks (Cacador & Franklin, 2021). A study by Retail Drive indicated that since 2008, around 56,000 stores, or 10.7%, have closed in the U.S., resulting in a loss of approximately 670,000 jobs

(Unglesbee, 2020). The combination of low salaries and high demand for retail workers underscores the need to address their meaningful impact through appreciative inquiry in retail businesses and to develop competencies for upskilling and reskilling.

Retail workers often face the challenge of making decisions with limited resources and support. Organizations need to recognize the strategic value of skilled salespersons and the importance of customer interactions. Salespeople, often accepting low-paying jobs, may perceive a lack of skills rather than recognizing the essential nature of their roles, which creates an solid economic advantage for the retailers. Amidst technological advancements and the shift to online retail, this current research study aims to identify the key skills, knowledge, attitudes, and other tools needed for effective customer engagement, which is a strength for brick-and-mortar retail. Agile salesforces, capable of adapting swiftly and accurately to changes, are crucial for long-term success. Retailers have started to emphasize customer engagement, an area where salespersons can significantly contribute more with necessary skills, knowledge, behavior, attitude, and attributes, all of which are defined as competencies. However, for retailers to effectively meet these growing demands, a clear understanding of the necessary skill enhancements is vital. This research gap needs addressing to prepare the retail workforce to create value from their contribution and career advancement.

Problem

The future of retail improvement is heavily influenced by various factors, including technological advancements, supply chain management, social and cultural changes, and geopolitical dynamics. The evolving nature of job requirements, especially with the increasing importance of computer literacy, indicates the changing role of salespersons in the face of automation and technological progress (McLagan, 1980; Stines, 2003). Many related competencies need to be explored to develop a competencies list for retail salespersons that not only reflects current data but also anticipates the future.

The adoption of AI, automation, and machine learning in retail is transforming the role of salespeople, emphasizing the enduring significance of human connection for retail success. With the growing alternatives for consumers, organizations and researchers are already acknowledging the challenge of maintaining customer experience and engagement levels (Grewal et al., 2009, 2017; Lemon & Verhoef, 2016; Puccinelli et al., 2009; Marketing Science Institute, 2016; Verhoef et al., 2009). As machines assume more routine tasks, salespeople's emotional and cognitive strengths become essential for customer loyalty, satisfaction, and engagement. Retail faces the challenge of evolving swiftly while strategically preparing its workforce for future customer needs. A comprehensive competency inventory for salespeople should include technical, product, and marketing knowledge alongside personal attributes like soft skills (Rothwell & Lindholm, 1999; Stines, 2003); creating such models can be costly, potentially ranging from \$1 million to \$3 million, which obviously create challenges for an organization to

develop, and this explains why there aren't any available for the home improvement industry retailers.

Sales staff, the face of retail, are central to customer interaction and business performance. With many salespeople, investing in agile learning and developing globally competent staff is critical. However, a definitive and widely understood list of competencies for salespeople to effectively engage customers is still needed to clarify and distinguish their ability to create value for the organization. The role of customer engagement in value creation is well-established, encompassing both transactional and non-transactional behaviors (Kumar et al., 2010; Grewal et al., 2017). Kumar and Pansari (2016) articulate customer engagement as a multi-outcome behavioral process that includes purchasing, referrals, influence, and knowledge sharing, underscoring the need to identify competencies that boost employee performance and understand the variables contributing to superior performance among individuals.

Consumer behavior and expectations are key factors in shaping the future of retail. As automation redefines tasks within the retail industry, salespersons are afforded a greater capacity to improve personal interaction with customers and enhance retail sales through effective customer engagement. This is further evidenced by the continued preference of customers to visit brick-and-mortar stores for product trials before purchases (Oh & Polidan, 2018). The role of retail salespersons is increasingly intertwined with technology, highlighting the need for them to adapt and utilize technological advancements to their advantage. The challenge lies in identifying the

specific skills required for salespeople to maximize their capabilities and better utilize these technological systems for future planning and development.

In the home renovation retail sector, salespeople are undergoing a significant role transformation driven by a shift towards exceptional customer service. This change is more than just enhancing customer service; it involves cultivating specific competencies tailored to the unique needs of the home renovation industry. The relevance and application of these competencies within the industry's specific context is a subject of ongoing discussion. This evolution in the sales role reflects a broader retail trend, shifting from charisma-driven strategies to a customer-focused approach. This pivot to a service-centric sales model requires a thorough review of its impact on sales organizations, including adjustments in training, personnel selection, and sales strategies, aligning with customer needs, process adaptations, and technological advancements. Despite acknowledging the critical role of customer engagement and salespersons in the success of retail, there remains a gap in understanding the exact competencies required now and for future retail salespeople. A competencies inventory was developed previously for various occupations, as listed below, adapted from the work of Stines (2003).

Understanding the pivotal role of customer engagement, it is essential for firms to delve into the impact of salespeople's competencies on this engagement. By aligning workforce development with strategic upskilling and reskilling initiatives, companies can better navigate the dynamic retail landscape. The competency-based model emphasizes not just past experiences but a modular and adaptable system essential for meeting organizational objectives in a changing market. Drawing from the works of Rothwell and Lindholm

(1999) and Stines (2003), who noted the limitations of traditional models anchored in retrospective analysis, this study advocates for a forward-thinking approach. Embracing methods like the Delphi technique, as utilized by Stines (2003) and Gliddon (2006), allows for a heuristic and prospective competency framework, crucial for the evolving nature of consumer behaviors and global market trends. This research aims to elucidate the competencies critical for salespeople within the home improvement sector, enhancing customer interactions and engagement in both present and future contexts and preparing the sales workforce for emerging industry shifts.

Purpose of the Study

This study aims to explore retail salespersons' perspectives on competencies required now and, in the future, to increase customer engagement in the home improvement retail stores in the USA.

Considering the importance of customer engagement, the question comes to what salesperson competencies impact customer engagement. The research will detail the competencies, why they are important, the competencies required to engage customers in the store, and how they might evolve in the future based on both salespersons and customers' perspective.

Research Questions

The retail organizations recognize the importance of creating a skilled salesforce. There are various efforts to know more about the competencies required for the salesperson to be successful in the workplace. The research in this study attempted to identify the critical competencies required for retail workforces to understand and skillfully engage customers in the store. This study aims to examine retail salespersons' perceptions of the competencies necessary to increase customer engagement in home improvement retail businesses. The research will investigate the competencies of retail salespeople, the competencies that drive consumer engagement, and how these competencies may evolve in the near future based on what salespersons have observed over the past several years. Furthermore, in order to explore future competencies required by retail stores to increase customer engagement, the current study sought to answer the following research questions:

1. What competencies directly or indirectly impact customer engagement in the home improvement retail business in the U.S.? This question aims to identify the specific competencies that significantly impact engaging customers in the context of home improvement retail based on the salesperson's perspective.
2. How are customer engagement-related competencies expected to evolve in the near future?
3. What are the most influential competencies on customer engagement in home improvement retail stores? This question seeks to understand the customer's perspective on salesperson competencies and their preferences.

These questions explore the perspective of retail salespersons since they live through the experience and can share the most from their own experience and can reflect the shift in future trends and changes in salesforce competencies that will be crucial for enhancing customer engagement. The future-focused question explores the dynamic nature of customer expectations and market trends and how salespeople can align their competencies accordingly to maintain customer engagement.

Significance of the Study

As the retail landscape undergoes significant transformation, the ability to engage and retain customers has become increasingly crucial. This research delves into the competencies required for salespersons to engage customers in-store effectively and anticipates how these competencies may evolve in the future. These insights are pivotal for the upskilling and reskilling of millions of salespeople, directly impacting their ability to adapt to changing retail environments and customer expectations. The study's outcomes aim to contribute significantly to the strategic development and training of the retail workforce.

There are 4 million retail salespersons, all of whom are going through a dramatic change in their working environment. Retail is the largest private employer in the United States, delivering 52 million employees (about twice the population of Texas), \$1 trillion (about \$3,100 per person in the US) in direct labor income, and \$3.9 trillion (about

\$12,000 per person in the US) in yearly contributions to the U.S. GDP (Mathews, 2020). Practitioners and researchers are concerned about the technological impact and nature of the impact on retail transformation; little is known about emerging phenomena such as micro-cloud computing, new robotics, artificial intelligence, 5G telecommunications, the meta-verse, augmented, or mixed reality. This research focuses on the future demands of home improvement stores, and how they leverage the workforce to engage customers at the stores. One typical argument is that when professions change, individuals need to survive and find employment, but in reality, many workers accept low pay, limited benefits, or disagreeable job assignments owing to a lack of certain skills. As a result, the average compensation for a retail salesperson is \$27,080, making it one of the lowest-paying occupations, with 4 million people and families living in poverty while working full-time (U.S. Bureau of Labor Statistics, 2020). Proactively strategizing the workforce can help the colossal workforce upskill or reskill at their convenience over time. It is often impossible for retail workers to go for years of schooling or training, but having a set of skills to develop can encourage the workforce to utilize time for developing skills and knowledge, which eventually will benefit them personally, and at a macro level the whole economy.

The study will look at consumer involvement in home improvement retail outlets, which make up a sizable portion of the overall retail market. According to IBISWorld study in 2022, the sector generates \$250.6BN in sales and \$35.6BN in profit per year (IBISWorld, 2023). Wages in the industry are \$21.9 billion (about \$67 per person in the US), with a 2.3 percent annual increase. Three large corporations lead the sector: Home

Depot Inc., Lowes Companies Inc., and Menards Inc., Ace Hardware. The home improvement sector is still a low-tech heavy, service-based industry where customer involvement may have the greatest influence on growth, and personnel must be keenly focused on their ability to engage customers. Customer involvement has received a lot of attention recently and is regarded as one of the most important benefits for retail, and often researchers call for engagement competency-based hiring in retail to uphold the value and purpose of retailers (Grewal et al., 2017). E-commerce is rapidly expanding, yet customer relationships are difficult to establish in the absence of interpersonal interactions. Several stores, like Macy's, JCPenney, and Best Buy, are dramatically decreasing their physical presence and relying more on online business models. Amazon, on the other hand, is expanding its physical presence.

Customer engagement has always been a big part of the home improvement industry's success. Menards' mission statement is "To service and Quality," and Lowe's mission statement is "Together, deliver the right home improvement products." In business, engagement refers to the unique relationships formed by service between customers, workers, and stakeholders. Customer engagement may be promoted in a variety of ways, and numerous studies have emphasized the relevance of social connection in increasing customer engagement with retail businesses (Kim, 2015; Vries & Carlson, 2014), but researchers also noted the need for further research on the best approach for salespeople to create customer engagement (Grewal, 2017; Punwattkar & Varghese, 2014; Sadique, 2020). Activities are underway to measure the extent of customer interaction. According to Vivek et al. (2015), consumer engagement consists of

three components: conscious attention, passionate involvement, and social connection. Conscious attention refers to the customer's level of interest in interacting, enthusiastic participation refers to the customer's feelings about the interaction, and social connection refers to joint activity in the presence of others. While trade research and retail associations address format-based retail development, academic literature is necessarily focused on the current change.

Customer engagement is a well-known issue among marketing academics and practitioners, but no study has been conducted on the link between employee competencies and customer engagement. While trade research and retail organizations explore format-based retail development, academic literature naturally focuses on current technical revolutions without considering worker capability (Alexander & Cano, 2019; Botschen & Wegerer, 2017). It is critical to understand how organizations may develop loyal consumers, and salespeople play a vital role in customer incentive to visit showrooms; unfortunately, no previous research addressed the competencies required for salespeople for the customer-retailer interaction (Gensler et al. 2017; Frassetto & Miquel-Romero, 2021). There is a gap between current scientific understanding and available resources that must be bridged if future sustainability is to be ensured. To provide a substantial avenue for retailers to adopt, retail store features must be feasible, controlled, and relevant to most merchants.

Retailers can retain consumers and establish shop loyalty by providing excellent customer service (Chou et al., 2016). To better understand the components and implications of workforce development, we must first understand the current shift in

customer expectations that is shaping retail's future. Due to many events and inventions, retail is changing faster, and a proactive mentality is required rather than reacting to what is needed, which assists in the development of a workforce for market needs. Given the retail conflict between online and traditional retail outlets, the transition is crucial, since it is narrowing the knowledge gap. It is not always effective to train workers for present demands unless you know what talents will be necessary in the next years and what competencies the retail organization will want. Deep searching through prior research contributions will offer us a framework of retail workforce capabilities, and in the second phase, qualitative data will supply us with the future competencies required based on retail life experience. A comprehensive grasp of the necessary abilities, expertise, and traits can assist retail firms in reskilling, upskilling, or recruiting important components that will aid in the development of a successful sales force. The data will be useful in improving the abilities of future generations and assisting the human resource professional community in guiding prospective human capital. The retail industry has a significant impact on the national economy, both directly and indirectly, and the four million salespeople must lead the front line with appropriate competencies; we will go further into the necessary skills to steer the future retail industry.

Given the number of challenges that retail organizations face in identifying effective, responsible salespeople under this economic and competitive pressure, as well as engaging customers for long-term relationships, it is surprising that salesperson competencies have not been investigated systematically and given the pandemic changes

and drastic shift of retail, the study will provide valuable resources for the home improvement industry.

Conceptual Framework

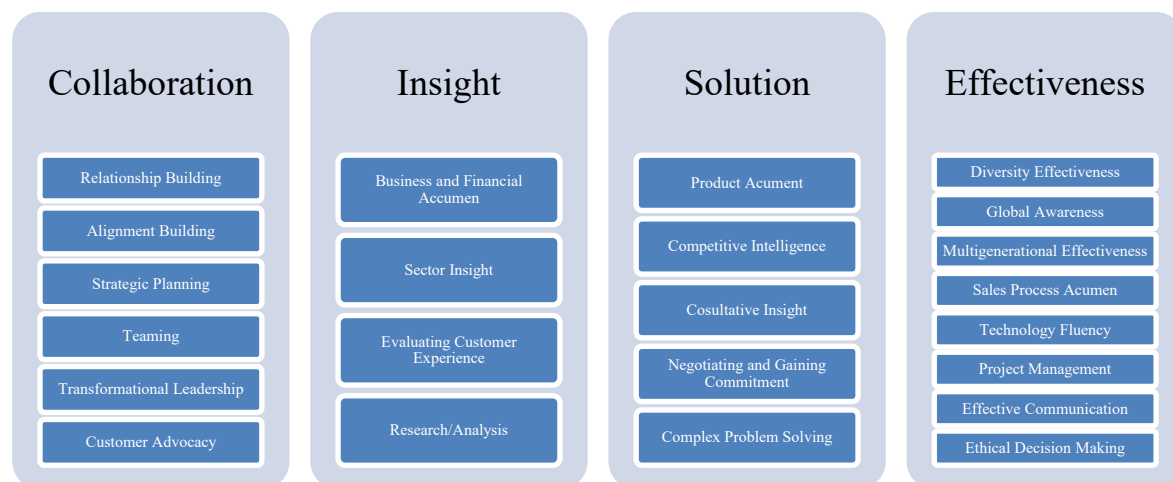
A retail organization is multifaceted, requiring a conceptual framework to navigate its complexities effectively. To conduct a study on salesperson competencies in the home improvement industry in the USA, a comprehensive approach based on existing scholarly work is necessary. The definition of 'competency' incorporated insights from Donahue (2018), Lucia and Lespinger (1999), and Rothwell (1999, 2008, 2014), among others.

The construct of sales performance in the evolving retail industry is multifaceted, with a growing emphasis on knowledge-intensive strategies. In this context, the knowledge, skills, abilities, attitudes, and other attributes of salespersons are becoming increasingly crucial in shaping customer mindsets. The Association of Talent Development's (Sisakhti, 2015) sales competency model framework, which includes four foundational competencies, is a great framework for structuring these vital elements (Figure 1-2). For salespeople in home improvement retail, particularly in brick-and-mortar stores, harnessing the right competencies is essential for enhancing customer engagement and, consequently, the success of the organization. The goal is to ensure that salespersons are not only aligned with organizational objectives but are also adept at

addressing customer needs and satisfaction, thus bolstering the overall performance of the business.

Figure 1-2

Foundational ATD World-class Sales Competency Model (Sisakhti, 2015)

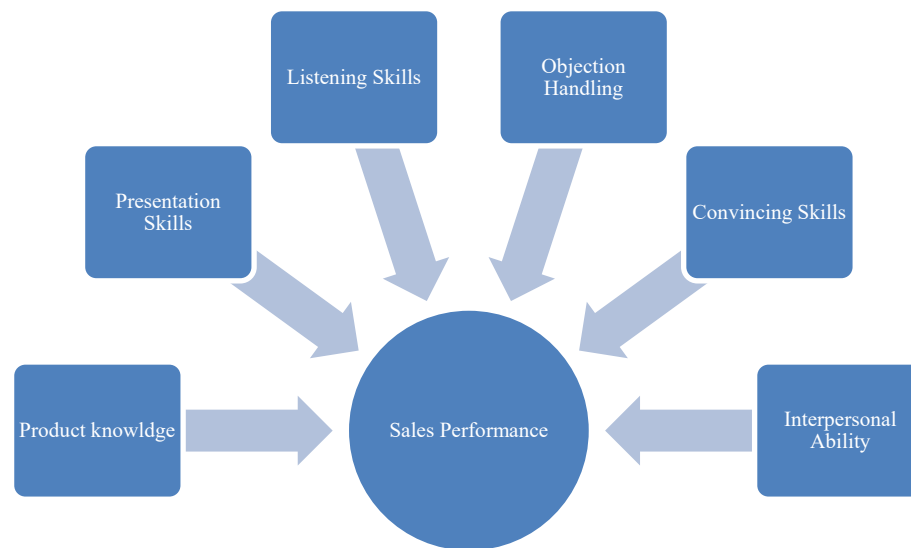


The foundational competency model by Sisakhti (2015) encompasses a broad spectrum of sales roles, ranging from frontline sales representatives like account managers and technical consultants to higher-level sales management and leadership positions. It also includes roles focused on sales enablement such as sales operation analysts and trainers. This comprehensive model serves as an informative tool for both organizations and individual sales professionals. This research, however, specifically targets the customer engagement aspect of sales performance, crucial for the sustainability of brick-and-mortar stores. It aims to identify key competencies that enhance customer engagement, drawing on insights from various models, including the

work of Punwatkar and Varghese (2014), as shown in Figure 1-3, which outlines essential competencies for general sales success.

Figure 1-3

Conceptual Model for Sales Performance in India (Punwatkar & Varghese, 2014)



This research builds upon existing groundwork, offering three developmental pathways for competency models: borrowed, borrowed, and tailored, or a fully tailored approach, as highlighted by Rothwell and Lindholm (1999). In the rapidly evolving home improvement retail sector, a mere borrowed or even a borrowed-and-tailored competency model may fall short in addressing the unique cultural, customer, and market dynamics focused on customer engagement. Considering the expected significant changes in retail and salesperson job roles and requirements, a process-driven tailored approach, which does not solely rely on the perspectives of existing occupation members, is most suitable

for developing relevant competencies (Rothwell & Kazans, 1998; Rothwell & Lindholm, 1999).

Limitations

Like any research, this dissertation has its limitations. The pandemic's impact may significantly influence perceptions, affecting the study's ability to capture post-pandemic dynamics accurately. We were in a transition phase when the whole world drastically embraced online shopping to maintain social distancing and, at the same time, felt the necessity of being physically present. While the Delphi method offers a great way to build consensus around future predictable changes, unforeseen future changes might not align with the findings. Personal biases and the qualitative nature of the research could also influence results, despite efforts to mitigate these through three rounds of modified Delphi approach. The study's limited number of participants and geographical concentration may affect its generalizability, though geospatial analysis attempted to address this. A more extensive participant base in future quantitative analyses could yield a more robust competency modeling for the home improvement retail industry and derive categorical results based on the perceived exemplary salespersons. Additionally, future studies might consider longitudinal approaches to track evolving trends and validate the study's findings over time. Organizational buy-in is necessary to develop competency

inventory and competency modeling further, which is often challenging when working with retail organizations.

Definition of Key Terminology

Engagement: The behavioral perspective is a unique positive relationship between customers and stakeholders.

Customer Engagement: An emerging approach to finding a meaningful connection between business and customers.

Retail: Retail refers to selling consumer goods or services to customers through various distribution channels to earn a profit.

Home improvement retail industry: Defined in the IBISWorld Industry Report 44411 as “Stores in the home improvement industry specialize in selling a diverse array of goods for home repair and renovation, including hardware, tools, electrical supplies, and construction materials like lumber. Unlike smaller hardware stores, which typically offer a more limited range of items, these larger home improvement stores provide a comprehensive selection. These businesses acquire their products from manufacturers and wholesalers and then sell them to various customers, including DIY enthusiasts and professional contractors, who utilize these materials for various home improvement projects.” (O’Connor, 2019).

Salesperson: Sell merchandise, such as furniture, motor vehicles, appliances, or apparel to consumers, O*net online job number: 41-2031.00

Competencies: Measurable and observable knowledge, skills, attitudes, attributes, and behaviors that are critical to successful job performance, including technical skills and soft skills.

Competency Cluster: Grouping a number of competencies around the main theme of the purpose (Spencer & Spencer, 1993).

Delphi: “A group process which utilizes written responses as opposed to bringing individuals together” (Delbecq et al, 1975, p. 83).

Summary

This chapter briefly discussed the historical perspective of retail transformation, the problem statement, and the significance of research findings. A review of relevant literature will be presented in Chapter II. The major areas of changes in a retail environment and how that impacts the retail workforce and sales approach will be discussed concisely in Chapter II. Chapter III describes the study's methodology; this includes the description and justification of sales, methods, analysis, and steps followed in conducting the study. Chapter IV will discuss the result and initial competency model for salespersons in retail. Finally, Chapter V will discuss the study's implications.

Chapter 2

Literature Review

This study aims to explore the competencies of salespersons that are vital for enhancing customer engagement in retail stores, particularly in the context of evolving market dynamics. As the retail landscape continues to shift towards digitalization, the role of the salesperson becomes even more crucial. While technology and artificial intelligence are reshaping job responsibilities, the strategic placement of salespersons as the face of retail organizations remains key to offering excellent customer service. This study will delve into how customer engagement is impacted by day-to-day operations in retail stores, recognizing the growing importance of human connection in an increasingly online market. As Mao (2022) highlights, customer experience is critical for business survival in competitive markets. The research will also address how forward-thinking businesses can strategically position themselves to meet future demands by balancing digital advancements with the irreplaceable value of direct customer interaction.

The retail business has historically seen some transition during the previous three decades, mostly due to major technological developments that served as tipping points. In the mid-1990s, television shopping was a popular trend; in the late 1990s, eCommerce retailing began; in the early 2000s, multichannel retailing was phased out; in the mid-2000s, retailers began radio frequency identification; in the late 2000s, customer relationship management was key; in the early 2010s, social media was a major influence, which turned into big-data analysis in the mid-2010s; and recently, we have seen widespread use of self-checkout lanes (Kumar & Venkatesan, 2021).

In the evolving retail environment, the role of salespeople has expanded beyond traditional customer service duties on the sales floor. Sales staff now juggle various responsibilities, reflecting the diverse nature of retail roles. It's essential to equip salespeople to enhance customer engagement and productivity properly. However, existing training programs often fall short of addressing these evolving needs. Research by Frassetto and Miquel-Romero (2021); Gensler et al. (2017); and Punwattakarn and Varghese (2014) indicates a gap in the literature regarding the dynamic requirements of retail establishments, particularly in customer engagement. This gap highlights the need for future-focused competency development for salespersons; a clear understanding of customer engagement, the current role of salespeople, consumer expectations, and how sales staff can contribute to the future of retail is crucial. This study seeks to address these areas, providing insights into how salespeople can be better prepared to meet the shifting demands of the retail sector.

Customer Engagement in the Retail Industry

Understanding customer engagement is crucial in the retail industry due to its long-term benefits, both direct and indirect, which are amplified annually with the increasing customer base (Pansari & Kumar, 2017). Engagement was first conceptualized by Kahn (1990), later many retail organizations became interested in this topic due to the growing resistance of traditional marketing programs (Bagozzi & Dholakia, 2006). Customer engagement-based research has grown exponentially since 2006, from 35

articles between 2006 and to 2010, 177 articles between 2011 and 2015, and up until 2020, there have been 649 articles published (Lim et al, 2022), the most prospective studies to review and demonstrate understanding are van Doorn et al. (2010), Brodie et al. (2013), Hollebeek et al. (2014), and Kumar et al. (2020).

The concept of customer engagement, as introduced by the Marketing Science Institute in 2006, focuses on consumers' behaviors and emotions toward businesses or services (Vivek et al., 2012). This engagement is characterized by trust and loyalty between customers and the business, even though subsequent researchers have expanded and redefined this concept. It is now widely regarded as a multidimensional concept comprising cognitive, emotional, and behavioral dimensions through customer-centric outcomes like satisfaction, participation, commitment, and brand value (Brodie et al., 2013; Kumar et al., 2010; Pansari & Kumar, 2017; Vivek et al., 2015). Kumar et al. (2010) noted that the outcomes of customer engagement include purchase behavior, referral behavior, influencing behavior, and knowledge behavior. Bowden (2009) and Sorenson and Adkins (2014) identified customer engagement as a predictor of business growth, highlighting customers' emotional or psychological commitment to a brand, product, or organization.

Pansari and Kumar (2018) found that engaged customers visit their preferred retailers 44% more than non-engaged customers, which directly impacts revenue generation. Referral behavior can be observed through positive word-of-mouth recommendations for a company's products or services. van Doorn et al. (2010) described engagement as a behavioral expression towards a firm, driving motivation in others

through recommendations, blogging, or reviews. Engaged customers often function as influencers, encouraging repeat purchases by those around them. They tend to remain loyal to a business despite competing marketing efforts. The loyalty of engaged customers is sometimes referred to as the firm's loyalty value.

Retailers must consider corporate profitability while developing sales strategies since the goal is to generate revenue. Customer engagement should provide sufficient value to retailers to motivate them to enhance certain salesperson competencies.

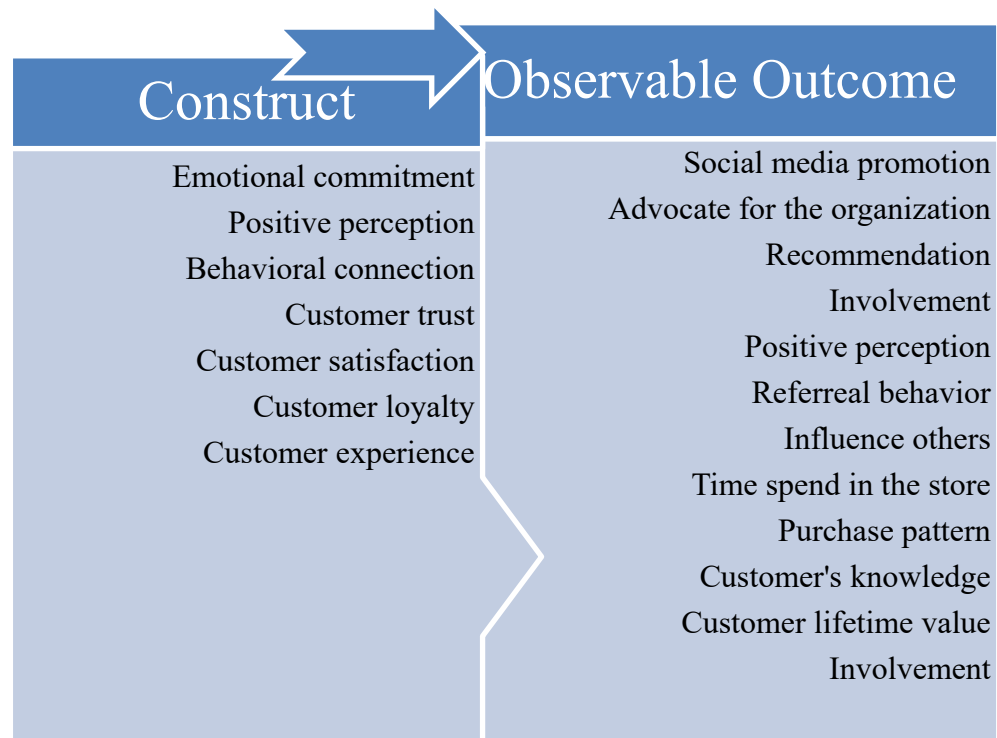
Customer engagement can be defined as a positive effect that assists customers in validating the source and product for their needs from a specific retail firm, resulting in increased sales through purchase and word-of-mouth.

In recent years, engaged customers have gained more influence by actively providing reviews on public sites, sharing thoughts on social media platforms like Facebook, and participating in blogging and other activities, all of which can significantly impact a business (Doorn et al., 2010; So et al., 2014, 2016; 2021; Vehrof et al., 2010). Busalim et al. (2017) identified two dimensions of consumer engagement based on a systematic literature review: psychological and behavioral perspectives. Cognitive engagement refers to customers' positive perceptions of a retail firm, while behavioral engagement can be measured through word-of-mouth, referrals, and purchase patterns. Behavioral engagement is a deeper level of involvement where customers advocate for a company and assist it by influencing others. Through behavioral engagement, a loyal customer base can be established, benefiting the company without additional costs beyond social interaction. So et al. (2021) identified five major areas of customer

engagement research, which are mostly focused on branding through social media, antecedents and consequences, value co-creation, conceptual foundation, and sustainability. Following the definition, Figure 2-1 shows the construct and observable outcome of customer engagement, whereas internal constructs are predictors of the subsequent observable behaviors. To understand customer engagement, Thakur (2016) developed a scale based on social facilitation, self-connect, intrinsic enjoyment, time filler, utilitarian, and monetary evaluation; notably, Thakur considered customer satisfaction a separate variable. Kumar and Pansari (2016) presented customer engagement by constructing four dimensions, namely customer purchase, reference, influence, and feedback.

Figure 2-1

Customer Engagement Construct and Consequences



In the context of this research, customer engagement is conceptualized as the cognitive and behavioral connection that customers form with a retail organization, manifesting through observable outcomes and the collaborative creation of value. This investigation's main aim is to identify and examine the antecedents of in-store customer engagement, with a focus on the influence of salesperson competencies. This exploration seeks to understand how the knowledge, skills, abilities, behaviors, and other attributes of salesperson contribute to the development of customer engagement, thereby facilitating the co-creation of value and enhancing the overall customer experience within the retail environment.

Competencies

Despite extensive research and many contributions from scholars and practitioners, a universally accepted definition of competency remains somewhat elusive, occasionally, 'competency' and 'skill' are used interchangeably (Stine, 2003). This is largely because competencies can be a blend of various attributes including knowledge, skills, characteristics, self-concepts, and attitudes, all of which collectively influence task performance. This view is supported by numerous studies and frameworks proposed by Edwards et al. (2007), Sampson and Fytros (2008), Spencer and Spencer (1993), and Wilcox (2012).

Competencies are often described as quantifiable measures of a person's abilities across different dimensions. These dimensions include skills, behavior, knowledge, and

attitudes, all assessed against a set of established standards and guidelines. This concept is further elucidated by Donahue (2018), who emphasizes the importance of these competencies in providing a measurable framework for assessing and developing professional skills.

Rothwell and Zaballero (2014) contribute to this discussion by defining job competency as the body of knowledge, skill, trait, or behavior that leads to effective or superior performance. They assert that these competencies can be observed through various behavioral indicators. For instance, in the context of a civil engineer, competencies like attention to detail or tenacity are crucial. These specific competencies are key to the successful execution of their professional responsibilities. The most utilized definitions of competency by professionals are included in Table 2-1.

Table 2-1

Definition of Competencies by Researchers and Practitioners.

Definition	Author
"Measurable and observable knowledge, skills, attitudes, and behaviors (KSABs) are critical to successful job performance. Competencies refer to the specific KSABs that a person can readily show. You include not only technical skills but also what are known as soft skills."	Donahue (2018, p. 21)
"An underlying characteristic of an individual that is causally related to criterion-referenced effective and/or superior performance in a job or situation"	Spencer and Spencer (1993, p. 9)
"Competency will be defined as an underlying characteristic of an individual including but not limited to the knowledge and skills that contribute to an individual's ability to perform a "specific job."	Favia, M. J (2010, p. 13)
Competencies are the knowledge, skills, abilities, and behaviors contributing to individual and organizational performance. Knowledge is information developed or learned through experience, study, or investigation. Skill is the result of repeatedly applying knowledge or ability. Ability is an innate potential to perform mental and physical actions or tasks. Behavior is the observable reaction of an individual to a	National Institutes of Health (2023)

certain situation. The target proficiency level for each competency will vary based on an individual's position and the organization's needs.	
Competency is a measurable pattern of knowledge, skills, abilities, behaviors, and other characteristics that an individual needs to perform work roles or occupational functions successfully. Competencies specify the "how" of performing job tasks, or what the person needs to do the job successfully.	U.S. Office of Personnel Management (2023)
"A set of competencies (typically 10-30) that describe the capabilities of successful performers. Competency models are derived by focusing on the behavior of successful performers instead of only examining and relying on the knowledge, skills, and abilities (KSA's) related to a list of tasks"	Rothwell & Graber (2010, p. 2)
Competencies are better predictors of job performance than academic aptitude and knowledge-based performance predictors, which includes cluster of life occupational and social outcomes. For illustrations, communication skills, patience, moderate goals setting, ego -development	McClelland (1973)
Competency is defined as a capability or ability. It is a set of related but different sets of behavior organized around an underlying construct, which we call the "intent". This construction of competencies as requiring both action (i.e. a set of alternate behaviors) and intent called for measurement methods that allowed for assessment of both the presence of the behavior and inference of the intent.	Boyatzis (2008, p. 6)
A competency is a fundamental attribute of an individual that leads to effective or outstanding performance in a job role. It encompasses a combination of skills, knowledge, and behaviors that are essential for successful job execution.	Klemp (1980)
Competencies refer to a blend of various attributes such as knowledge, skills, attitudes, and patterns of thinking. When effectively applied, either on their own or in combination, these traits lead to proficient and successful performance.	Dubois (1998)
The competency-based selection method is healthy, structured, and comprehensive. Candidates are evaluated on the competencies they need to demonstrate when inducted into the organization. The performance management competency system diagnoses the employees' future training and development needs, and it helps the HR executives assist employees in decisions like promotions and transfers.	Gaspar (2012)
Competencies encompass a set of essential factors crucial for accomplishing significant outcomes in a specific role within an organization. These factors are a blend of knowledge, skills, and abilities, traditionally referred to as "KSAs." They are defined through specific behavioral examples and are typically exhibited by outstanding performers in those roles.	Chouhan & Srivastava, (2014)
Competencies are skills, knowledge and its application, traits, values, beliefs, and attitudes that lead to good performance in a specific context, situation, or role	Woodall & Winstanley, (1998)
A descriptive tool that identifies the skills, knowledge, personal characteristics, and behaviors needed to effectively perform a role in the organization and help the business meet its strategic objectives	Lucia & Lespinger, (1999, p. 5)

The concept of competencies, though frequently discussed in research-based publications, suffers from a lack of conceptual clarity due to the broad spectrum of definitions. This diversity in interpretations hinders the establishment of a uniform definition for future reference. Keszy and Antoniewicz (2023) highlight this issue, noting the conceptual blurring surrounding the idea of competencies. Erpenbeck et al. (2014) argue that a definitive understanding of competencies may never be achieved, suggesting that their nature is inherently subjective. Similarly, Batching (2020) contends that competencies are ultimately defined by individual perceptions, further emphasizing the subjective aspect of this concept.

Hayes (1979) identified five competencies: knowledge, intellectual, entrepreneurial, interpersonal, and on-the-job maturity. The concept of competency encompasses five major components; each component represents a different aspect of an individual's abilities and characteristics that contribute to their overall competence in a professional setting (Hayes, 1979; Tucker & Cofsky, 1994; Rothwell & Lindholm, 2002; Stines, 2003). Following is an explanation of each component:

Knowledge

This refers to the theoretical or practical understanding a person has about a specific area. It is about what someone knows. For instance, a surgeon's knowledge of human anatomy is crucial for their role. This knowledge base forms the foundation upon which skills and other competencies are built.

Skill

Skill refers to the ability to perform tasks effectively and efficiently. Skills are often developed through practice and experience. In the case of a surgeon, it's their ability to perform surgical procedures. Skills are the application of knowledge in practical, real-world situations.

Self-Concepts and Values

This component covers a person's attitudes, values, self-image, and self-confidence. It's about how a person views themselves and their approach to work and life. For example, a surgeon's self-confidence in their ability to perform successful surgeries is a part of this component. It influences how they approach challenges and interact with others.

Traits

Traits are innate characteristics and consistent ways of responding to situations. They can include physical attributes necessary for a job, like good eyesight for a surgeon, as well as behavioral traits like the ability to remain calm under pressure. Traits are often seen as part of a person's personality and can significantly impact how they perform in their role.

Motives

This component involves the internal drives, desires, and impulses that lead a person to act. Motives can be emotional, such as a desire for recognition, or more physiological, such as basic needs. In the context of a surgeon, a motive might be the desire to collaborate effectively with other team members, driven by an interpersonal orientation and a sense of responsibility toward team success.

These five components together create a comprehensive picture of an individual's competencies, representing not just what they can do (knowledge and skill) but also who they are (self-concepts, traits, and motives). Understanding these components is crucial in competency modeling and workforce development since it helps in identifying and nurturing the necessary qualities for specific roles and professions.

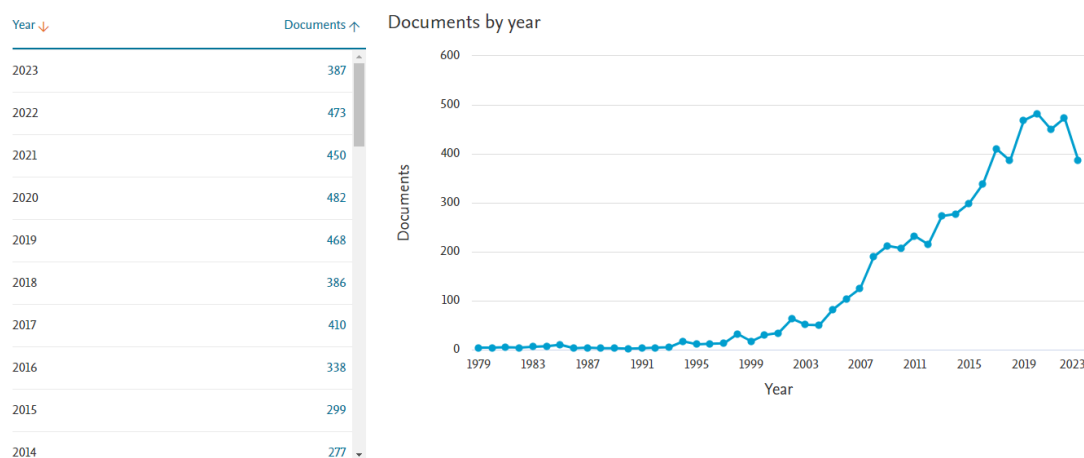
It is important to understand the difference between competencies, competence, job tasks, and capabilities. White identified a human trait in 1959, which he named 'competence', which McClelland expanded to 'competency modeling' and questioned the reliability of intelligence tests as a predictor of job success, initiating the 'competency modeling' movement by outlining 'competence' predicting approaches (Rothwell & Lindholm, 2002). The concept of a job task is defined as a specific unit of work that contributes to the achievement of desired outcomes. Each task is an actionable and measurable component of a job (Parry, 1998). Job competence refers to an employee's overall ability to meet the requirements of a job, producing the expected level of output or performance (McClelland, 1973). Competency in a job context is defined as a set of observable and measurable behaviors, skills, and attributes that contribute to enhanced performance (Rothwell & Lindholm, 1999; Rothwell et al., 2014). Capabilities refer to the potential for growth and adaptation, encompassing the latent qualities that an employee can develop (Ulrich & Smallwood, 2012). These references collectively provide a comprehensive understanding of the various components that contribute to an individual's effectiveness in a job role. They distinguish between the concrete tasks of a job, the broader competence to perform the job effectively, the specific competencies or

behaviors that can be observed and measured, and the latent capabilities that signify potential for future growth.

A bibliometric study was conducted to further analyze the current impact and understanding of competencies. To conduct this quantitative examination of written publication, the Scopus database was used, with generic search words such as “competencies”, and “competency”. The total search for competencies showed 142, 213 results in Scopus with 63,977 limited to business and social science. Excluding clinical competencies and competencies, the search was narrowed to more focused “competencies,” “competency-based education,” “competency,” or “core competencies.” The result was limited to 6,011 documents. Over the years, the interest of competencies in books, articles, chapters, and conference papers has grown as we can see from Figure 2-2.

Figure 2-2

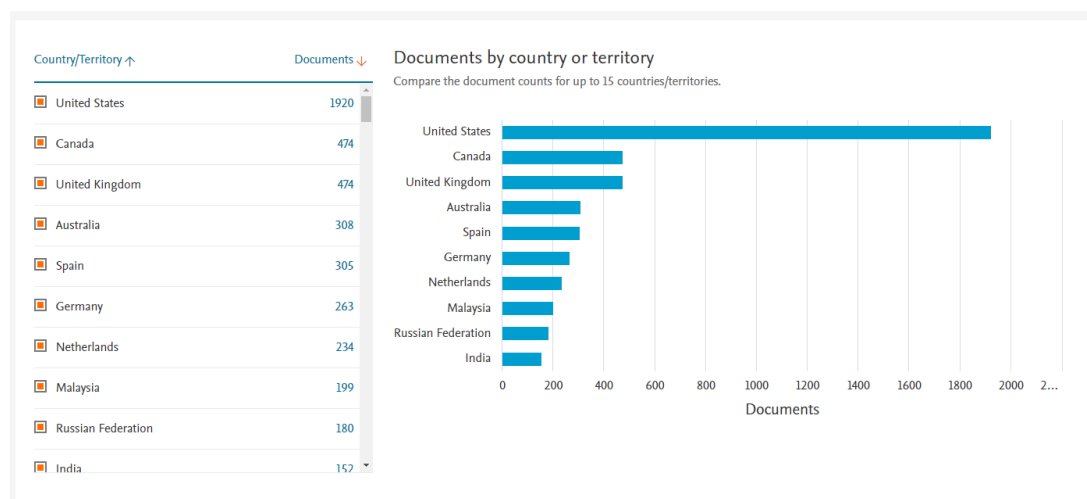
Documents Published Under “Competencies.”



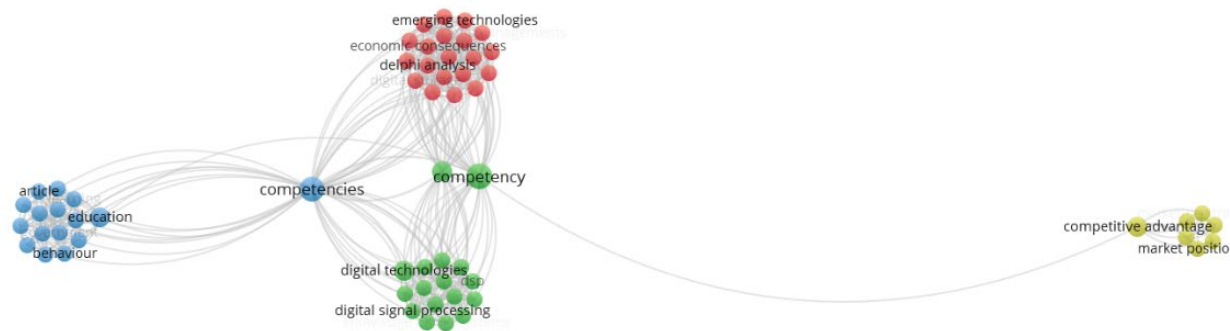
Without any further screening process, figure 2-3 show the cumulative number of papers published in different countries and the top 10 countries with research contributions around competencies. The competencies were a subject of interest in the US than in any other country, based on what was found on Scopus, as shown in Figure 2-3

Figure 2-3

Document Publication Comparison among Countries.



Upon analyzing the results from Scopus using VOS viewer Software version 1.6.19, as illustrated in Figure 2-4, the study of "competencies" in scholarly research presents four distinct thematic clusters. Each cluster represents a unique dimension of research in the field, showcasing diverse focus areas and perspectives. This approach helps identify and understand the various aspects of competency-related research prevalent in academic studies.

Figure 2-4**Visual Representation of Competency-Based Research****Cluster 1 - Future Forecasting with Delphi Techniques**

The first cluster comprises scholarly journals that concentrate on exploring future trends and predictions. This cluster is particularly interesting because it employs various Delphi techniques. In this cluster, researchers use these techniques to anticipate future developments in their respective fields. This may include identifying upcoming challenges, emerging technologies, or evolving industry dynamics. Delphi shows up as a widely popular approach for competencies analysis.

Cluster 2 - Key Factors and Capabilities

The second cluster identifies and analyzes key factors and capabilities essential for success. This could encompass a wide range of topics, from specific technical skills and knowledge areas to broader organizational capabilities. The research here is centered on understanding what factors contribute to effective performance, how these can be cultivated, and their impact on outcomes in various contexts.

Cluster 3 - Human Behavior and Education

The third cluster relates to human behavior, psychology, and education. This area of research is crucial as it delves into how human factors influence various processes and outcomes. This could include studies on decision-making processes, learning methods, behavioral patterns in organizational settings, and the development of educational programs to enhance certain competencies. The focus here is on the human element of professional practice and how it can be understood and improved.

Cluster 4 - Competitive Advantage and Market Strategies

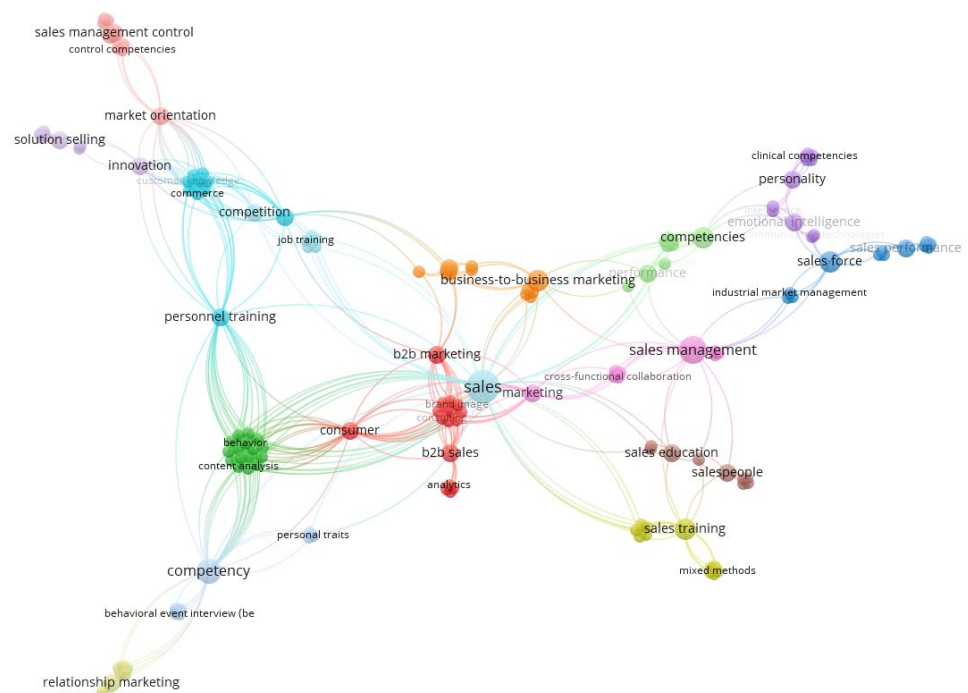
The fourth bibliometric cluster is centered on competitive advantage and market strategies, with a particular focus on how competencies contribute to these areas. This cluster explores how organizations can leverage specific competencies to gain a competitive edge in the market. It could cover a range of topics from strategic management, market analysis, to how specific skills and knowledge can be harnessed to develop effective market strategies.

Each cluster represents a significant research area and contributes to a comprehensive understanding of the field. By examining these clusters, researchers and practitioners can gain insights into various aspects of their field, from future trends and essential capabilities to the human factors influencing their domain and strategies for gaining competitive advantage. This kind of analysis helps not only in identifying current areas of focus but also in pinpointing gaps and potential areas for future research. Finally, figure 2-4 shows recent research databased, and it's evident most of sales related research are primary focused on b2b sales, analytics, or consumers. Other clusters explore

training, behavior, and relationship marketing. There is a very weak link between competencies and salesperson, which indicates a gap in research around salesperson competencies in retail stores.

Figure 2-5

Bibliometric analysis of research around Sales.



Approaches of Competency Identification and Why It's Important

Several scholarly approaches have been developed for identifying competencies in various fields and professions. These methodologies provide a systematic way to

determine essential skills, knowledge, behaviors, tools, traits, and motives of the particularly effective performance of a role. Some well-known approaches are as follows:

Table 2-2

Competencies Identification Methods or Tools

Avenue	Explanation	References
Behavioral Event Interview (BEI)	This technique involves conducting in-depth interviews with exemplary performers in a role to uncover the behaviors and characteristics that lead to their success. The aim is to identify patterns of behavior that differentiate superior from average performance.	Spencer & Spencer (1993), Boyatzis (1982), McClelland (1975), Dubois (1998)
Expert panels	Invite experts panel and ask them to identify which specific KSAT helped them to perform in that level. Panel members should represent their profession and have power to implement findings should they choose.	Delbecq et al., (1975), Rothwell & Kazanas (2008)
Job Model Task/Function analysis	Define the job model based on outputs, consequences, inputs, conditions and feedback. Then look to identify competency based on job behavior, attributes, job standards, work support, and human relations.	Langdon & Marrelli (2002)
Direct observations	Direct observation of an employee performing critical tasks and coding activities for competencies.	Dubois and Rothwell (2000) Spencer & Spencer, (1993), Parry (1996).
The borrowed approach borrowed and tailored approach, and tailored approach.	The borrowed approach requires the identification of a competency model and purchase it; the tailored approach involves building a competency model from scratch and tailoring it to the needs of a specific group; the borrowed and tailor method is identifying a competency model and tailoring it based on the need.	Rothwell and Lindholm (1999) Rothwell & Kazanas (1998)
360-degree evaluation of self and others	Performance management appraisals are based on multiple sources, such as managers, peers, and clients, with qualitative descriptions of behavioral strengths and weaknesses.	Lucia & Lepsinger (1999), Parry (1996)
Delphi procedure	Written questionnaires for a smaller group of high performers, interacting in multiple rounds to reach a consensus.	Rothwell & Kazanas (2008)

It is important to understand the impact of competencies as they play an essential role in the performance of employees. Competency developed based on high performing employees can be utilized to increase productivity as much as 20 times than a regular-performing employee since the high performing employees can be trained based on established competencies (Dubois & Rothwell, 2004). Competency-based human resource management is recognized for its potential to unleash the productive power of exemplary performers

Retail Salesperson Competency-Based Job Overview

Salespeople are retail personnel that interact directly with customers in order to sell items. Retail salesperson abilities are a crucial component in raising customer return rates in the retail environment, and it has been experimentally demonstrated that managers may obtain the maximum value through retail salesperson competencies improvement (Ertekin et al., 2020). Retail salespersons' responsibilities include greeting and answering client demands, preparing items for consumers to purchase or rent, resolving customer issues to the best of their abilities, and creating a satisfying shopping experience (National Center O*NET Development, 2022). The work duties are clear, but the customer's expectations of a salesperson are frequently unrestricted, and salespeople, therefore, need extensive training to provide excellent service. A salesperson's position is paid hourly, and productivity is judged by other duties accomplished outside of client

engagement during those restricted hours. Conflicting obligations within and outside the organization were identified as boundary spanners by Ingram et al. (2005). A retail salesperson does not have a pre-requisite to entering the career, which opens opportunities for many skilled and unskilled labor force from different demographic populations. Most employers look for communication skills to anticipate customer needs and adequately address them, requiring minimum knowledge of products and learning. Although retail salespersons can find a job without any formal experience and previous educational background, most of the pieces of training are provided while doing the actual job by the managers. Retail salespersons have a physical challenge since they require prolonged hours of standing and lifting heavy items. A retail person spend a considerable amount of their job hours meeting and interacting with new people; they need to learn about their products to sell and understand how they may meet customer requirements.

The income of retail salespersons is one of the lowest-paid jobs in the USA, with \$13.13 hourly and \$27,320 annually, which is well below the required income for a family (U.S. Department of Labor, 2022). However, the data from the government website does not accurately reflect the benefits of working as a retail salesman; as the NRF (National Retail Foundation) pointed out, the data is skewed due to a high percentage of part-time, temporary, and young inexperienced workers in the retail business. Even while employment is widely accessible for people from many backgrounds, employers frequently do not pay enough to live on. To establish a sustainable customer retention rate, physical retailers must pay attention to front-line

employees and increase capabilities. Salespeople are sometimes overlooked owing to a lack of knowledge about the skills and competencies required to be effective. Instead of engaging people in routine tasks, it is critical to identify their capabilities and prospects. According to McWilliams et al. (2016), because employees will be performing less repetitive activities in the future, ensuring customer happiness will be their main concern; and to achieve those goals, they will need to be educated to function in their new capacity. According to Mittal et al. (2005), efficient organizations that provide exceptional customer service outperform their competition; in this cutthroat environment, excelling implies survival. Adopting a customer engagement strategy can provide a distinct competitive advantage to all retailers to gain consumer favor (Verhoef et al., 2010), which frontrunner major retailers can employ in conjunction with an upgraded workforce to implement those plans and generate a long-term potential for merchants.

This research aims to develop a competency model specifically designed for sales professionals in the home improvement retail sector, equipping them for the evolving retail landscape. This model serves as a strategic tool across various stages of human capital development such as recruitment, selection, and succession planning, emphasizing customer engagement.

Over the past decades, competency models have been recognized as pivotal in different industries:

- HRD Professional Competencies (Rothwell & Sredl, 1992): Focused on competencies for Human Resource Development (HRD) professionals, aligned with ASTD standards.

- Healthcare Competencies (Goldstein, 1995): Concentrating on specific competencies in the healthcare sector.
- Future HRM Trends Competencies (Rothwell, 1996): Aimed at identifying competencies relevant to emerging trends in Human Resource Management.
- Logistics Competencies Study (Pfohl, 1997): A detailed analysis of competencies in logistics.
- Occupational Medicine Competencies (Phillips, 1999): An inventory of competencies specific to the practice of occupational medicine.
- Technical Managers Model (Rifkin et al., 1999): A competency model developed for technical managers.
- WLP Model for ASTD (Rothwell et al., 1999): A model focusing on Workplace Learning and Performance, created for the American Society for Training & Development (ASTD).
- Workforce Developers Competencies (Rothwell & Gerity, 2004): Concentrating on competencies for professionals involved in workforce development.
- Leadership Competencies in Various Industries (Bergstrom, 2012): A comparison of competencies among leaders in manufacturing, hospitals, and community banks in Pennsylvania.
- OD Practitioners Competencies (Worley et al., 2010): Focused on competencies for Organizational Development practitioners.
- Human Resource Management Competencies (Dubois & Rothwell, 2004): A comprehensive study on competencies in Human Resource Management.
- Educators' Pedagogical Competency Model (Susanto et al., 2021): A model that outlines pedagogical competencies essential for educators.
- Hotel Management Industry Model (Hemsworth, 2019): A competency model specific to the hotel management industry.

- Leadership Ability Competency-Based Approach (Donahue, 2018): Concentrates on a competency-based approach to assessing and developing leadership abilities.
- Industry 4.0 Competencies (Hernandez et al., 2020): Identifies competencies relevant for professionals in the context of Industry 4.0.

These models have been instrumental in enhancing professional practices and setting benchmarks within their respective domains. The proposed competency model for the home improvement retail sector seeks to build upon these foundations, addressing both present competencies and anticipating future needs to foster a more effective and agile sales force.

Unique Impact of Salesperson's Role

Salespersons are often the face of the organization, which serves consumers directly, and the only person to connect with directly. Therefore, every aspect of salesperson behavior consists of the risks and benefits of positive or negative perceptions of customers. Salespersons are perceived as direct sales experts, but with the growing eCommerce, they act as influencers to help customers make decisions, which might or might not impact the sale outcome. The source of product purchase creates a fresh new challenge to evaluate salespersons, and their role is often not valued as it should be. An important finding to consider is that the experience with salespersons' characteristics, competencies, and friendliness influences customers' perception of online store

usefulness and enjoyment (Verhagen et al., 2018). Customer engagement requires strategically uncovering customers' needs, discussing product features, and gaining commitment; the overall process requires a substantial amount of time from the salesperson (Good et al., 2021; Jasmand et al., 2012). Consumers use their experience with salesperson's competencies in the stores to decide online, creating an indirect value perception for the transaction. Accelerating technologies, increasing product compacity, and expanding volumes of information is changing the way salesperson contributes to the consumer's decisions in the new selling environment.

Brand image is strongly connected with an individual emotional and cognitive link with the brand, which a salesperson can help to establish and utilize to increase sales (Chinelato et al., 2021). Salespersons contribute to improving businesses in many different aspects, but most research works are designed to address communication and consumer decision-making. The responsibilities of salespersons start with the first impression of customers, which dictates the future direction of the business. Companies can identify additional value propositions besides communication to establish initial interactions.

Current and Future Salesperson Competencies

Competencies in the workforce transcend mere task completion; they encompass a range of elements including technical skills, motivation, personality traits, and awareness that

contribute to exemplary performance (Rothwell & Graber, 2010). Competencies are classified into various types (Boyatzis, 2008)

Emotional Intelligence Competency

This involves recognizing, understanding, and using one's own emotional information effectively.

Social Intelligence Competency

This refers to the ability to understand and utilize emotional information about others to enhance performance.

Cognitive Intelligence Competency

This is the capacity to think and analyze information and situations effectively. These competencies highlight the dynamic nature of human talent, which can be developed throughout adulthood.

In the retail context, the evolving technology-oriented consumer landscape, which often leads to a sense of loneliness (Rippé et al., 2018), emphasizes the role of retail salespersons. They can mitigate this loneliness by creating a socially welcoming environment, thus positively impacting consumer behavior (Forman & Sriram, 1991). Retail spaces serve not just for final sales but also as venues for attracting potential customers, influencing the salesperson's self-efficacy and performance outcomes, beneficial at both individual and organizational levels.

A retail salesperson's performance encompasses non-observable behaviors aligned with organizational goals and observable outcomes of job functions. Levy and Sharma (1993) noted that both judgmental and non-judgmental measures are essential for

performance evaluation. Traditionally, performance has been heavily reliant on sales volume metrics. However, current market trends necessitate a broader view of performance evaluation, considering factors like customer trust and loyalty, which drive indirect sales. Rapp et al. (2015) highlighted the risk of reducing salesperson roles to basic tasks when customer engagement is not appropriately valued. Rothwell and Graber (2010) suggest that performance gaps, when identified, should be addressed through targeted performance management or individual development plans, thereby aligning with evolving retail responsibilities and market conditions. This approach ensures and strengthens the need for a more comprehensive assessment of a salesperson's contribution beyond just sales figures.

When television faced the "cutting the cord" phenomenon, it was initially seen as the end of traditional TV. However, instead of declining, television adapted by embracing technology for viewer personalization. Just as television, invented in 1925, adapted and thrived through technological advancements like "cutting the cord," retail stores can also evolve. The key to this evolution is embracing a hybrid model that caters to changing consumer behaviors. By offering personalized experiences that align with consumer preferences, physical stores can sustain and expand, despite the rise of online shopping. This approach reflects the need for adaptability and innovation in traditional business models to stay relevant in a rapidly changing market landscape (Brett, 2018). The perceived salesperson's competencies enhance the relationship between a customer and an organization; influential expert salespersons can earn the most trust in the buyer-seller relationship as a relationship manager (Crosby et al., 1990; Srinivasan et al., 2020). An

expert salesperson can maintain a conversation with consumers and suggest a new business depending on the opportunity. A salesperson's ability to close the sale ultimately depends on the salesperson's competencies in persuading the buyer (Crosby et al., 1990). Unlike before, retail salespersons must be experts at face-to-face marketing. They need to understand and incriminate multichannel marketing in different stage of the buying process (Vanheems et al., 2013). Analytical skills are an emerging need in retail salespersons to increase the manipulation of selling information and tools. Hawes et al. (1993) developed a list of salespersons attributes including trustworthiness, service speed, product knowledge, patience, persuasiveness, eagerness to help, and relationship maintenance. In a separate list, Chinelato et al. (2021) included role perception, aptitude, skill level, motivation, personal characteristics, and environmental variables as the main drivers of a salesperson's performance. McLagan (1980) identified the importance of competency models, which help with recruitment and selection, assessment, workforce planning and development, career mapping and development, coaching, counseling, and succession planning. Spencer and Spencer (1993) found similar use of the competency model; additionally, competency helps performance management, payroll systems, Human Resource Management Information Interface, and workforce planning.

The Impact of Salesperson Competencies on Customer Engagement

As defined in business, engagement refers to the unique relationships between customers, employees, and stakeholders. The issue has been explored in several

disciplines, such as education, psychology, management, and information systems (Vivek et al., 2015). Kahn (1990) applied engagement to work for the first time to explain the behavior of employees dedicated to their jobs. Kumar et al. (2010) addressed the importance of customer engagement, emphasizing the valuation of the customer and developing value metrics from transaction and non-transaction behavior. Non-transactional behavior is essential for satisfying customers by providing more than expected. Retailers have already invested ample time and effort to cultivate and develop a favorable attitude toward their stores to increase loyalty (Grewal et al., 2009). Vivek et al. (2015) conceptualize a three-dimensional view of customer engagement, including conscious attention, which addresses the customer's Degree of interest to interact; enthusiastic participation, which indicates the customer's feeling related to the interaction; and skill refers to mutual action in the presence of others, which requires a substantially skilled salesperson. It is proven that they cannot compete with online stores from the price point; however, online stores are very weak in customer communication and product presentation to communicate functionality (Hoffman, 2019); with proper balance in two platforms, the future of retail can be more effective and efficient. Some researchers examined the sociability of salespersons including the environmental factors, and how that enhances the pleasure arousal and patronage of consumers (Grewal et al., 2009). Satisfied, engaged customers add value through enthusiasm and delightful interaction via social networks as brand ambassadors, which eventually helps to create a unique brand image.

Salesperson Competencies in the Home Improvement Industry

The home improvement industry is accountable for 184.3-billion-dollar revenue with an 11.3% profit margin and is one of the fastest-growing industries with 1.1-3.8% growth in the last decade (O'Connor, 2019). According to O'Connor, the industry is very labor-intensive, with employees undertaking several duties, including merchandising, cash handling, transaction processing, and customer service. The home improvement industry is placed in a slightly different format than traditional retailers since the products they sell are unique and require specialized people to install, in some cases, licensed technicians. The market segment can be an important factor in deciding the strategies. In the home improvement industry, 81.8% of customers are professionals who are involved in construction work (Hoffman, 2019).

Only 18.2% of customers are regular homeowners or DIY consumers. DIY consumers are also rising with technological advancement. The number of actual customers is low, but they are the owners and decision-makers for contractors. The requirements and expectations are different among the customer base, where DIY consumers are tech-savvy with no experience at the job. Inside the industry, there is a new trend of do-it-yourself among budget-conscious consumers, where products are designed to be more customer-friendly to install (O'Connor, 2019). The industry depends on salespersons to explain the product features and share their experience through communication with the clients. The industry is still heavily dependent on physical brick-and-mortar stores; the next five years, the industry employees are expected to rise with an annualized rate of 2.6% to 781,289 workers, which is in the opposite direction of national

retail industry status (O'Connor). The industry has already availed consumer analytics technology to face professional customers and regular consumers and increasingly adopting technology.

One of the key success factors for this industry is the loyal customer base, which requires customer engagement at the stores to repeat buyers. Employees are often encouraged to contribute through social media marketing through Facebook, blogs, Twitter, and LinkedIn. Some businesses often create instructional videos to guide customers and recommend add-on products. The top competitors intensively use technology to sell products in the store and outside the store. The home improvement is slightly affected by the increasing online sales. They are not immune from the impact but contain the market share against the threat through brick-and-mortar industries (O'Connor). According to J. D. Power, the top-ranked customer satisfaction-based organizations are Menards, Ace Hardware, Lowes, and Home Depot.

The home improvement industry is growing against the overall department shakeout even though it is carefully adapting technology to workers' advantage, but it is still highly dependent on the salesforce to attract and retain customers. Besides traditional task responsibilities, this industry created a unique role for salespersons and is highly dependent on them for running the business. "The strategy is aimed at the customers who may be wary of starting a home improvement project without being able to examine the products personally and benefit from staff expertise first" (Hoffman, 2019, p. 31).

Even though retail is dependent on technologies, technologies are not going to replace humans in retail since human interaction is far more effective than automated

messages (Kumar et al., 2017). Unfortunately, the home improvement industry hasn't had much attention from the research perspective. However, in a booming industry, it is essential to understand the competencies of a successful salesforce and what skills will be vital for them in the future.

Summary

Salespersons play an important role in generating revenue for retail organizations. They are the front face of the organization, and the whole organization system depends on their performance with clients. Salesperson performs a boundary-spanning function; while technology decreases a substantial amount of human contact through kiosks, service robots, and delivery systems, the empathetic service and "human touch" will still be a competitive advantage for physical retail stores (Bowen, 2016; Subramony, 2021). Unfortunately, there is always a shortage of trained sales professionals who understand the current market needs and act on the organization's goal. Since the market need is shifting, the salesperson needs to know the importance of their responsibilities and how they make a massive difference by retaining a solid customer base. With the high level of competition, customer engagement remains the most crucial competitive advantage, adding value to products on the shelf that online stores will not be able to match. Developing a competency list provides salespersons and trainers with a framework to achieve and the hiring team to follow.

A salesperson's unique contribution to the organization is undervalued. In Chapter 3, the research explored the salesperson's contribution, the importance of customer engagement, and the competencies previous researchers pointed out in different contexts. The transition has been noticeable in the last several decades. Still, the job is underrepresented in the research field. The expectation from a salesperson is often high in the organization and perceived as low value. Without a proper understanding of the competencies and the role of salespersons in the organization, the job assignment can be

unclear. The salesperson's job does not require any pre-qualification; the competency list can be a sound support system to find the perfect employee for the position without asking for educational qualifications. According to Rothwell et al., the salesperson competency development framework can be divided into three parts: knowledge of self, knowledge of product and service, and knowledge of clients and business (2001). To create a competitive salesperson under the constant change in home improvement retail, a refreshed competency model considering all categories will be beneficial for the organization. There is a list of competencies available for the retail organization, but none of them address the customer engagement issues and how the competencies will change shortly. The fifty-year-old Delphi technique is appropriate for understanding future needs with some modifications based on research needs. Over the past few decades, the technique has helped identify competency models for many occupations, from culinary arts to information technology. According to Helmer (1966), Delphi is a systematic method for solicitation and collation of expert opinion. The next chapter will cover the modified Delphi approach to develop a salesperson competency model for increasing customer engagement in home improvement stores.

Chapter 3 Research Methodology

Traditional competency models often rely on retrospective studies, focusing on past critical events without a forward-looking perspective (Rothwell & Lindholm, 1999). However, given the significant changes in retail due to technology, automation, and evolving customer behaviors, a future-focused approach to competencies has become essential (Sadique, 2020; Stines, 2003). The research methodology integrated a prospective naturalistic inquiry with a pragmatic, inductive qualitative analysis following a modified Delphi approach. This approach was vital in addressing the current debates over the significance of the future evolving competency, shedding light on what competencies are necessary now for the salesperson to increase customer engagement. The key challenge was in determining the relevance and reliability of available data sources concerning the competencies of retail salespeople, especially considering the significant shifts in the retail landscape and the expectations from the salesperson. This inquiry also raised epistemological questions about the understanding and interpretation of knowledge in this context: Were the competencies identified online directly applicable to current practices, and did they align with the everyday experiences of salespeople and how they engaged customers in the store amidst the dynamic retail environment? Were there any fixed competencies generalizable to all salespersons in all situations? Probably not, but pragmatically, this research aimed to derive a set of competencies that can be applied in training and development for salespersons in home improvement retail stores. As a result, the salesperson can increase customer engagement if they master all the

competencies. In this study, the ontological approach was grounded in a constructionist perspective, recognizing that social constructs deeply influence the development of salesperson competencies and that our understanding of these competencies is inherently context-dependent. Epistemologically, the research adopted a relativist stance. This acknowledges that insights into salesperson competencies were subjective and heavily influenced by research experiences and biases. The focus was to delve into and understand the unique perspectives and experiences of the participants concerning salesperson competencies without superimposing our preconceived notions onto the findings. This approach allowed to capture a more nuanced and contextually rich understanding of the competencies that drive effective salesperson performance, and the information was in the form of collective information to help the organization add value.

It is presumed that available information is sufficient to sustain minimal salesperson performance. However, there was a gap in information because the knowledge, skill, attitude, behavior, and other abilities necessary for salesperson customer improvement in home improvement retail have never been investigated; a salesperson's ability to engage customers is a relatively new topic to explore as well. For salespeople to effectively connect with customers and build engaging relationships, there needs to be a more explicit focus on defining measurable and observable behaviors, knowledge, skills, abilities, and attitudes required to master. This enhanced clarity better equips salespeople to attract customers back to the store, ensuring they have the necessary tools and traits to create meaningful and lasting customer connections where

automation has a minimal capacity and still has no possibilities to take over shortly other than increasing convenience to support the process.

Job task analysis is a common approach to creating job descriptions for salesperson occupations. However, from an ontological perspective, the salesman acts as an agent. Through consciousness, a shift can be generated in their nature of reality, in which we can ask some fundamental questions about what it means to be a salesperson in the modern retail landscape. This includes understanding the competencies required for their role, identity, and purpose for more significant success in their career. Salespeople are undervalued in the firm since their talents are considered general competencies accessible in the pool of prospective employees. However, with a competency inventory, this profession will be meaningful in creating more success-ready professional salespeople for the home improvement industry.

Researchers are not limited to preconceived notions or ideas from previous researchers; they also supply an opportunity to explore in-depth, open, and complex phenomena. A retail salesperson competency list was offered based on what salespeople, leaders, and customers already know about the sales position and related responsibilities to be a successful performer. E-commerce has gained dramatic market share because of the Covid-19 pandemic, and social distance has established a new barrier between consumers and the retail environment. Almost everyone has experienced online shopping and supplemental services from an established retail company due to the rapid situation change, such as delivery and curbside pickup, with which they can compare their experience. Existing knowledge and abilities are soon becoming obsolete because of how

swiftly social and organizational change affects the retail industry. Exploring retail salesperson competency will help retail decision-makers and trainers support their team; at the same time, automation might want to explore the opportunity to develop similar competencies through artificial intelligence. The purpose of this study was two-fold. First, this study sought to develop and analyze a systematic approach to developing current competencies required for successful salespeople; second, the study focused on refining and adding rigor with future-oriented competency inventory.

The research aim was to delve into the salesperson's experiences and discern the evolution of competencies in present and future contexts. To this end, combining the modified Delphi method with the naturalistic phenomenon was particularly suitable. However, it was essential first to explore why the Delphi method aligns well with this purpose. With its structured communication and consensus-building process, the modified Delphi technique captures diverse and experienced salesperson's perspectives. It was an ideal choice for identifying and understanding competency shifts within the dynamic field of salespersons.

Delphi Methodology

The Delphi technique is a method for the systematic solicitation and coalition of expert feedback, which allows the refinement of group judgment through interactive questions (Dalkey, 1969; Helmer, 1966; McPherson et al., 2018). The Delphi technique is famous for forecasting equipment based on expert consensus, a proven tool for exploring

opinions rather than facts (Yoon et al., 2021), and a perfect fit considering the future uncertain retail transformation. The research approach focuses on preparing the salesperson for the future. Researchers have previously used different approaches to the Delphi study to understand and predict strategic needs for the future, e.g., Morley (1990) explained the Delphi study to forecast possible strategies, Lunsford and Fussell (1993) utilized Delphi to research the promising growth of marketing business services, and Wee Yong et al. (1989) used Delphi to project the future of the Singapore Tourism industry.

Delbecq et al. (1975), the founder of the Delphi study, suggested that Delphi can be modified based on the researcher's need to make educated decisions. Everett (1988) studied information system workers' competencies through a 2 round Delphi study. Polanin (1990) and Ewing (1991) utilized similar modified Delphi to identify competencies for different working populations. Cheng et al. (2005) considered job tasks and duties a discrete set of micro competencies. Rowe and Wright (1999) identified four key features necessary to define a 'Delphi' study: anonymity, iteration, controlled feedback, and statistical aggregation of group response. Some variation exists (Linstone, 1975; Martino, 1983) due to the explosive growth of applications of Delphi study, but Delphi is always considered a reliable instrument to measure the subjective truth of application rather than evaluation.

Characteristics of the Delphi study

Delphi techniques follow a series of iterations and try to conduct a consensus through quantitative analysis. The participants responded through mail, email, and software, and thus never met face-to-face. Delphi provides a unique opportunity for groups to agree on a solution through iteration. Delbecq et al. (1977), Murry and Hammond (1995), and Stines (2003) identified some characteristics of Delphi, some of which this research benefited from:

1. Individually generated ideas provided a large number of perspectives.
2. Writing submission allowed for generating high-quality ideas and gave participants flexible time to share their ideas.
3. The ideas participants shared are their own, even though there is some repetition after reaching the saturation point, and the geospatial analysis demonstrates that the participants are scattered all over the USA.
4. The anonymous nature of the Delphi process helped participants avoid pressure while referencing specific behaviors or conformity pressure.
5. Multiple iterations, particularly involving the customer's perspective provided all the modified Delphi participants a sense of closure; they were communicated with the result accordingly.

Delphi vs Alternatives

Different methods can be compared with Delphi, such as statistical measures, content analysis, phenomenology, case study, or Enhanced Critical Incident Technique. Various methods could be utilized for competency analysis and inventory development for the retail salesperson. Delphi was coupled with analysis, interviews, self-administered survey, and statistical analysis. Developing a list of competencies for engaging customers requires ground-up information from the salesperson to get an overall picture of the knowledge, skills, abilities, and other attributes they require and a consensus from customers that they agree with the competencies. Relying on quantitative statistical methods requires an existing framework to reflect on the dynamics adequately. Single statistics will not be able to capture subjective data and fully capture the aspect of this research. Qualitative studies such as phenomenology or case studies would create a list of various competencies without any additional agreement, and retrospective studies would not shed light on how these competencies may evolve. Delphi goes beyond individual experience or content to gather viewpoints.

Many researchers used the DACUM and Critical Incident Technique (CIT) approach to benefit the Delphi process. However, the expert's opinion on the DACUM approach is focused on current observable and measurable behaviors of successful salespersons, which would not satisfy the third objective of this research, which is to understand the customer's perspective and how competencies will evolve. At the same time, among these three closely fit choices, researchers have previously favored the Delphi technique unconditionally in the last two decades. Studies by Robeson (1988) and

Ono (1994), among others, have demonstrated the reliability of the Delphi technique, showing its effectiveness in capturing evolving trends and competencies over time (Ament, 1970; Armstrong, 1978; Gliddon, 2006; Helmer, 1966; Wiersma, 2000). This is crucial in retail sales, where market dynamics and customer expectations change rapidly. While the Delphi technique has been favored in recent decades, the recommendation for future research incorporating the DACUM approach could provide valuable insights into specific, observable behaviors under each competency. This could complement the broader, future-oriented insights gained from the Delphi technique.

Research Design

A typical issue with qualitative research is the lack of a clear relationship between the technique and philosophical foundations to guide the process, which causes uncertainty in the study's objective, structure, and findings (Lopez & Willis, 2004). This research paper will continue to clarify the philosophical foundation and how the research technique will connect with the research values and claims to eliminate any remaining opacity.

Naturalistic inquiry and inductive methods

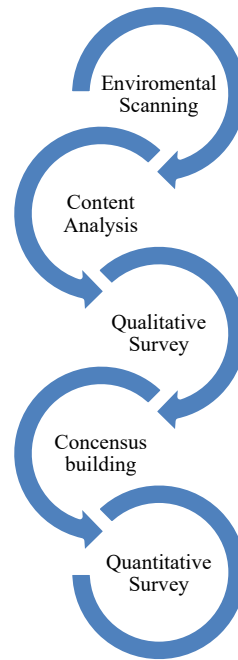
The qualitative research approach does not consider a single reality; rather, it considers multiple and evolving philosophic understandings of world nature and analyzes different standpoints from which to evaluate the meaning of situations (Caelli et al.,

2003; Sandelowski, 2002). The meaningfulness and reliability of qualitative study depend on the understanding and merit of the researchers, and every detail of the research action is essential to articulate. Because of the study's exploratory nature, a prospective naturalistic inquiry methodology coupled with a pragmatic inductive analysis approach was used following a three-round Delphi technique. Patton (1990) defined naturalistic inquiry as a study of the real world concerning social phenomena in a natural setting without manipulation or control and in an open setting without any preconceived notion by the analyst. Inductive patterns, relevant variables, and themes emerge from data, which leads to the development of theoretical concepts rather than the enforcement of ideas from prior data collection and analysis (Gliddon, 2006; Patton, 1990; Stines, 2003). Pragmatism refers to theory applications and focuses on the outcome rather than the origin. Also, they do not generate new theories but will synthesize an emergent model based on ideas that surface from the analysis, which can be used in practice.

To determine the competencies of salespersons required to engage customers in the store, the environmental scanning process was conducted simultaneously with a literature review, and three iterations of a modified Delphi study were used, as shown in Figure 3-1. The Delphi method is a tried-and-true approach for organizing group discussions to agree on a subject based on individual viewpoints (Linstone & Turnoff, 1975; Solnet et al., 2014).

Figure 3-1

Data collection method



Competencies lists are compilations of knowledge, skills, abilities, and other qualities (KSAOs) required for success in the relevant occupations, and can be measured against well-accepted standards, and can be improved via training and development (Greengard, 1999; Lucia & Lepsinger, 1999; Parry, 1998;). Competency inventory refers to the collection of competencies, its creators frequently group capabilities according to specific work categories. The competencies are individual knowledge, skills, abilities, behavior, and other qualities or combinations of multiple KSAOs grouped together (SHRM, 2022); however, in a critical manner, they go beyond being just lists of KSAOs. Competency modeling considers future career orientation, which is a vital objective of

this study project, to identify how these competencies will evolve in the future. The qualitative design of the study seeks to develop a deep and detailed understanding of the competencies, 'phenomena' is perceived as a somewhat loosely constructed model, and there is flexibility in predictions (Patton, 2002; Wiersma, 2000). It is standard practice to design training skills for employees by consulting experts and coming to an agreement after a Delphi study was created (Barrett & Heale, 2020; Hallowell & Gambatese, 2010).

Environmental Scanning and Researcher's Positioning

Environmental scanning aims to understand the target population, gain a holistic view of the current situation, and identify trends in research areas in the retail industry (Stines, 2003). It is a process of monitoring and proactively exploring when anticipating problems and exploring opportunities. In the early stage, the scan was guided by the personal experience of the researcher and experiencing the retail environment as a manager and leader of a team.

The researcher has four years of working experience in different management positions in the home improvement retail industry, with multiple awards and promotions throughout his career. Before leaving retail to conduct research, the researcher was assigned as a department manager with enrollment in fast-track succession planning. Leading and training a team provided a great experience and a passion for engaging customers and utilizing team effort to increase revenue. As an award-winning sales manager and competition winner, the researcher was always determined and constantly

searched for ways to understand salespersons' competencies to increase customer engagement with the store. The home improvement industry is uniquely positioned, with bulk-size products and DIY customers requiring support from salespersons to understand products, applications, and alternatives. The stores dominate and grow mostly among brick-and-mortar stores due to bulk products for building materials, hardware, paint, and electrical lights/fans. Following the trend, the home improvement industry is still progressing in connecting and engaging with customers. It is interested in being more effective in attracting more customers inside the stores.

Besides direct experience, the researcher actively tried to make connections with other organizations and understand their interest in sharing the information. The researcher also contacted the National Retail Federation for support to work with retail salespersons. Retail organizations are very protective of their data and information due to the fierce competition, and it wasn't easy to get any response.

After the environmental phase, the literature review was conducted based on customer engagement, competencies, salesperson competencies, and the impact of competencies on customer engagement, Delphi, and the modified Delphi approach. This exploratory study was based on a qualitative methodology to explore the competencies from the salesperson's perspective. According to Rowe and Wright (1990), the Delphi procedure has four critical features: anonymity, iteration, controlled feedback, and statistical aggregation of group feedback. Delphi technique has evolved since its origin, but many fundamental characteristics remain as it was initially designed (Barrett & Heale, 2020). The fundamental characteristics include the overreaching approach based

on a round of study, participants being able to see previous round results to review opinions, and the findings being shared anonymously (Barrett & Heale).

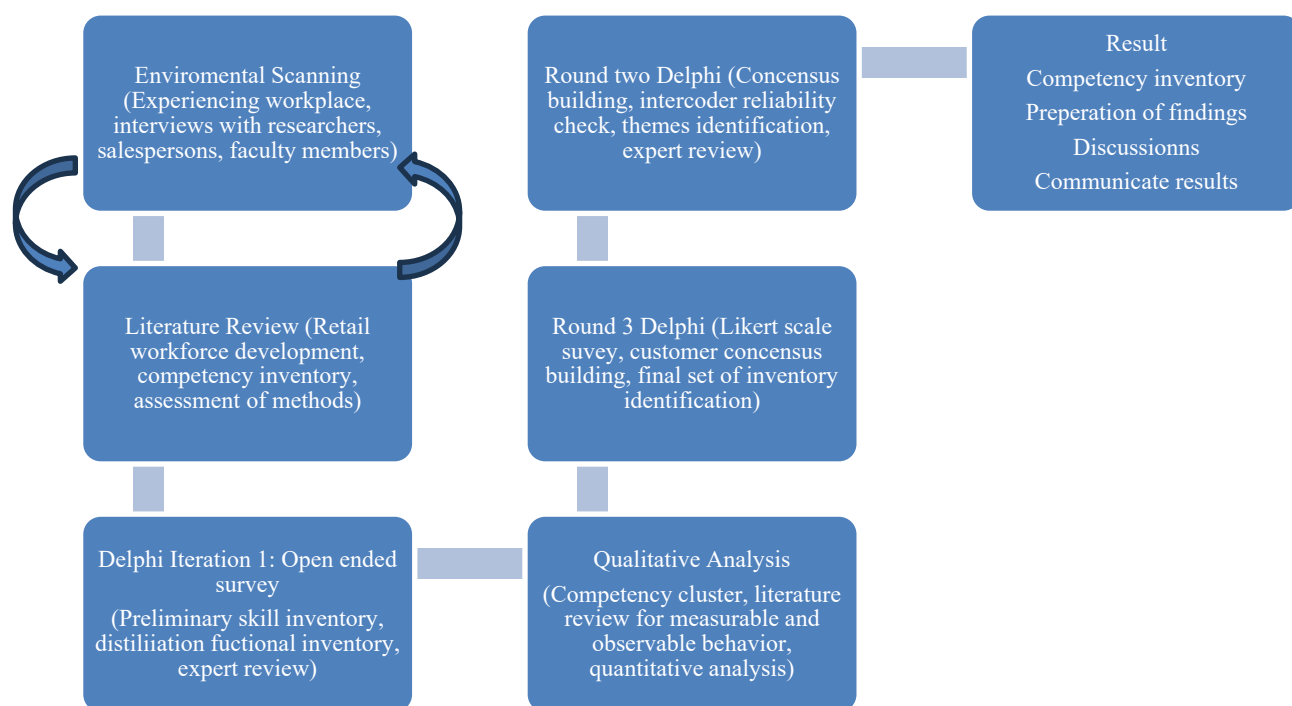
The survey-style qualitative data-collecting process for the Delphi research was used for this particular research to allow participants to explain their living experiences and ideas (Gliddon, 2006; Solnet et al., 2014). The list of competencies for retail salespeople was examined through a thematic analysis process using a qualitative method that combined a modified Delphi technique with an environmental assessment. The first step was to understand the responses and, using NVivo, categorize the interviews into initial codes based on themes; the second step was to create the coding rules and determine the category. The third step was to refine the codebook. This intercoder reliability check is considered a formative check frequently throughout the analysis. And on the fourth step, meeting with additional subject matter experts to discuss the findings and intercoder agreement and complete a summative check (Gliddon, 2006). Intercoder reliability is reported to verify the agreement between two additional coders, Drs. Israa Samarin and Dr. Michele Welliver. Finally, the findings were categorized and input into the second iteration instrument.

This method was ideal for research since it used the Delphi technique to acquire the most trustworthy consensus from a practical standpoint and input from several geographically scattered groups (Rowe & Wright, 1999). In the next step, another survey instrument was developed. After reviewing it for face validity following a five-step process recommended by Radhakrishna (2007), a pilot test was conducted among eight participants. Finally, the instrument was widely shared with the customers of Home

Improvement Retail, and 41 participants' responses were analyzed for the final analysis and competency inventory, as shown in Figure 3-2. The Delphi technique's strength lies in its flexibility, enabling consensus-building among participants, thus ensuring a comprehensive understanding of the competency shifts.

Figure 3-2

Overview of The Research Methodologies: Modified Delphi



Population and sample selection

The qualitative study sample size depends on the purpose of the inquiry since there are no set rules for the sample size (Patton, 2002). However, for the development of

competencies, saturation will need to be confirmed. Researchers recommend various sizes of participants for the Delphi study, which ranges from a few experts to a few hundred (Rowe & Wright, 1999). However, according to Delbecq et al. (1975), a homogeneous group of ten to fifteen participants might be enough.

After considering different perspectives and retention challenges for multiple iterations of the Delphi study, I collected data from 83 participants for the first iteration. The data was collected through purposive sampling, requesting responses from social pages such as LinkedIn and personal networking. Later, the source was verified through different perspectives to ensure the generalizability and reliability of the representation. The goal was to collect as many perspectives as possible covering different demographics; after 55 collected samples, a saturation was observed in the data. After reaching 83, the sample collection was stopped and moved toward the next step to iteration 2. Purposeful sampling with the snowball technique helped the sample grow, and a few gift cards were offered to motivate the long data collection process for six months. The following criteria were used for the salesperson for iteration 1:

- Participation is entirely voluntary.
- Participant age is at least 18 years.
- Has had experience working in a home improvement store in the USA.

Expert selection criteria:

The labeling of experts is contentious and can be defined as someone with substantial knowledge and experience as a salesperson, but it is practically difficult to measure experience quantitatively (Nasa et al., 2021). For this research, salesperson with

four or more years of experience working in retail as salesperson criteria was used to select the panel of informed individuals (Anyone less than 4 years of experience was removed from the final data analysis)

The expert panelists were informed of the procedure and requested to leave their email addresses for the follow-up processes. The email address was used to conduct iteration 2, inviting 7 people after the data cleaning process. For the quantitative data collection to consider the customer's perspective, the following criteria were used:

- Your participation is entirely voluntary. You understand that you may withdraw from the study at any time for any reason.
- You are at least 18 years of age.
- You have experience shopping at home improvement retail stores in the USA.

Instrumentation

The research methodology for exploring the competencies of retail salespersons for customer engagement in the home improvement industry in the US was designed with comprehensive and methodical approaches, integrating qualitative and quantitative data collection methods to achieve an in-depth understanding of the required competencies.

First Round: Qualitative Survey Instrument

In this study, participants were focused on its purpose: to investigate the competencies of salespersons in home improvement retail environments, focusing on enhancing customer engagement. Personal identifiers, except email addresses, were not collected to ensure confidentiality for future communication and consensus development. The study started with an open-ended survey featuring seven questions targeting current and future-relevant competencies, supplemented by five demographic queries. As per Charmaz (2014), this qualitative approach aimed to shed light on the topic by gathering rich, nuanced data directly from those in the field.

In qualitative investigations, the survey data collection approach is highly effective if the researcher knows and adheres to the instrument's essential criteria. Starting with a simple inquiry on personal experience, the instrument progressed to discussion and exploring other themes or areas of interest; the survey interview enabled respondents to explore fresh views and questions (Alvesson & Ashcraft, 2013). The invitation letter highlighted the purpose of the research study and how it will benefit businesses and individual salespersons.

The first instrument included seven questions targeting the current competencies and the competencies they think will be important in the future, with an additional five demographic questions used in the qualitative interview to elicit replies from the expert panelist. When conducted properly, a thorough qualitative data collection can "illuminate the topic" the researcher wishes to study (Charmaz, 2014). In qualitative studies, the survey data collection method is very effective if the researcher understands and follows

the critical characteristics of the survey instrument. By starting with a simple question from personal experience, the instrument shifted towards the discussion and exploring other themes or areas of interest. The survey interview allows respondents to explore new perspectives and questions (Alvesson & Ashcraft, 2013).

Multiple reviewers reviewed and approved the interview questions, which are elaborated on in the findings section. Appendix B contains the IRB proposal for the utilization of human research subjects. To obtain approval from the home improvement sector, multiple promotional materials have been utilized with invitation letters directly to salespeople. The invitation letter explained the goal of the research project and how it will benefit business and executive decision-makers. To recruit participants following pre-determined parameters, different social groups related to salesperson, retail, or home improvement organizations have been used. As mentioned, the first round of study took six months to complete but resulted in 83 responses from salespersons in the home improvement organization. The follow-up study was designed to agree on the competencies. The second iteration was developed from the findings with 11 categories and knowledge, skills, attitude, behaviors, and others, and participants had an option to a) keep the original item, b) edit the original item, c) delete the original item, and d) remove the original item (Harvey et al., 2022). Participants were also asked to provide any rationale for their choice of selection or edit suggestions. Since prioritizing competencies isn't the goal of this research, the feedback was limited to accepting, modifying, or removing each competency indicator.

Experts reviewed this draft questionnaire, and each expert was invited for an hour-long interview to discuss areas for improvement. Jeffrey McNulty (Founder and CEO of Retail Ethos) was invited to reflect on current practices in the home improvement retail industry, the importance of the research study, and comments on the newly developed tool. One of the feedback items was to limit the data collection time to 15 minutes for busy professionals to increase the response rate. Dr. Aileen Zaballero (Co-editor of the competency toolkit for HRD Press) examined the qualitative instrument and provided feedback on the face, content, criterion-related, concurrent, predictive, and construct validity of competencies. The survey contained a well-designed introduction to initiate and encourage their feedback on the important topic. The quality of material, tone, style, and wording presentation were considered to convey the significance and value of the data.

Second Round: Refinement and Consensus Building

For the second iteration, a survey tool was developed based on the findings from the first iteration, and participants were asked to revise their cumulative list of competencies for home improvement retail salespersons to engage customers. The survey questionnaire was designed to refine the result and build a consensus if there was any disagreement among participants. The second iteration noted the findings and included all the competencies such as knowledge, abilities, attitude, behaviors, and others, with

participants having the choice to a) keep the original item, b) change the original item, c) delete the original item, or d) remove the original thing, and finally accept or reject the current list (Harvey et al., 2022). Participants were also asked to explain why they chose certain options or make modification suggestions if they had a different opinion. Because prioritizing competencies is not the purpose of this study, the feedback was restricted to accepting, altering, or eliminating each competency signal. Retention in a multi-round Delphi study is a challenge, and the instrument was developed to be completed within a few minutes to increase the retention rate.

Third Round: Customer Perspective and Quantitative Analysis

The third round of the study was directed to the customer to refine the result based on the customer's perspective. Since customers are the primary target to attract, it's important to understand what they feel important to see while meeting with a salesperson in the store. The instrument for the third round was quantitative and developed based on the results from the round 1 and round 2 instruments, aggregating 11 competencies to understand the customer's perspective on each knowledge, skills, attitudes, behaviors, and other observable and measurable actions. A questionnaire using 56 questions targeted toward knowledge, skills, attitudes, behaviors, and attributes that are required now to engage customers and eight specific changes that can be anticipated were developed for customer consensus. Three reviewers, Dr. Aileen Zaballero, Penny Ann Barr, and Azza

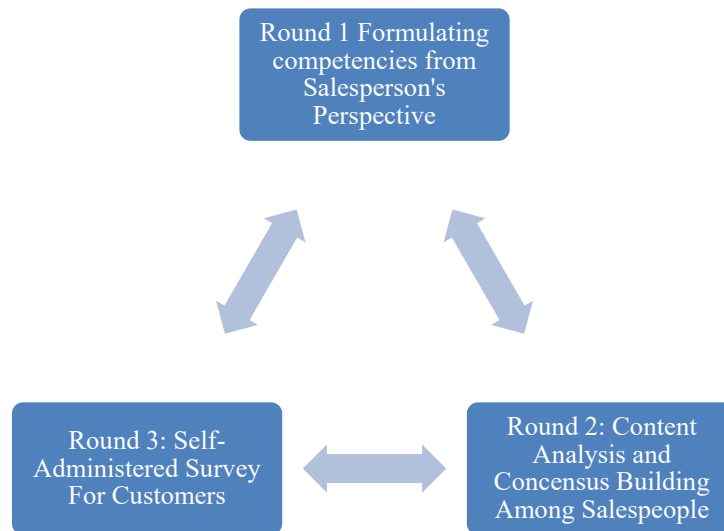
Al Hajiri verified the face and content validity of the instrument. In the next step, the instrument was pilot-tested with eight responses to avoid measurement error.

Data Collection Preparation

The study employed a modified Delphi technique, as outlined by Linstone & Turoff (2002) and Harvey et al. (2020), structured into three distinct rounds. The three iterations, illustrated in Figures 3-3, were designed to facilitate structured communication and refinement of content. In the first two rounds, the goal was to develop a list of competencies, categorize them with participants' feedback, and provide them multiple opportunities to edit, add, or delete items from the previous round and provide continuous suggestions, ensuring a dynamic and iterative process of consensus-building, as detailed by Harvey et al. (2020), Hsu and Sandford (2007), and Rowe et al. (2015). In the final round, data was collected with a separate instrument from the customer, which confirms the data and method triangulation for richer, comprehensive means of establishing core competency inventory (Figure 3-3). This method allowed for the gradual refinement and validation of the study's content.

Figure 3-3

Data and method triangulation

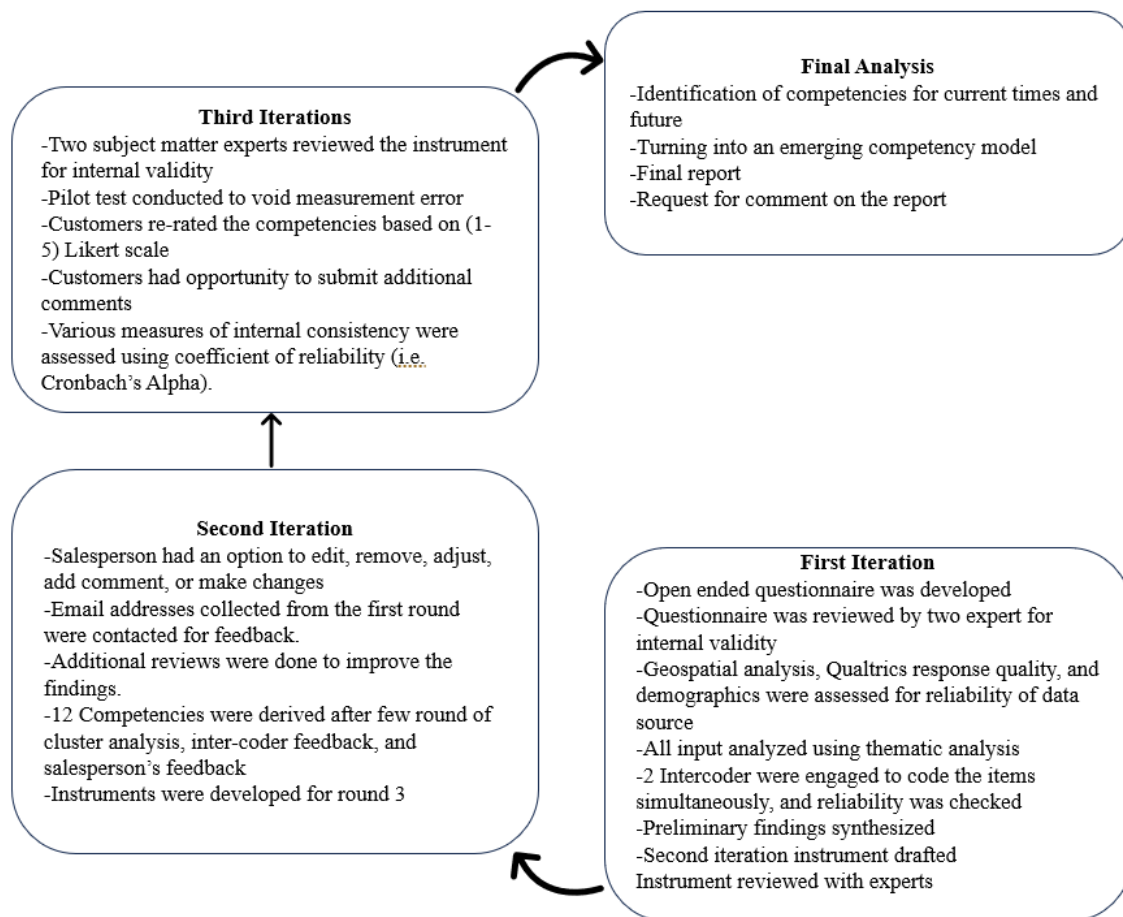


Due to its exploratory nature, the use of the Delphi approach in this study facilitated a blend of qualitative and quantitative methods. The qualitative aspect of the study was instrumental in allowing for the adaptation and development of ideas. At the same time, the quantitative portion was key to conducting factor analysis on competencies and systematically incorporating the customer's perspective to prepare a more refined list of competencies for the salesperson. As applied in this study, the modified Delphi method is comprehensively illustrated in a diagram in Figures 3-4, which effectively highlights the main steps of the process and demonstrates the methodical approach taken to gather and analyze data.

Various survey instruments have been used to collect qualitative and quantitative data for this research. The information was utilized to create and refine the competency model.

Figure 3-4

Modified 3 Iteration Delphi Method Detailed Diagram.



Data Collection Procedure

The business manager and executives were approached for the research to get access to the broader community. Since retail businesses like to maintain and retain internal information, the recruitment process was changed to a direct approach to the salesperson, with confirmation of full confidentiality, which helped this research to gather multiple perspectives from several organizations. Prior discussions with academics and practitioners supplied the researcher with a wealth of ideas and research directions within the scope of the study. After securing the IRB, interviewers were recruited using a purposive convenience sample. Predetermined inclusion criteria were used to recruit participants. The initial contact was made through email or a LinkedIn link, and participants were asked to recommend someone else to forward the link to, a person they know who meets the survey criteria. Multiple one-page invitation letters in simplified English were produced to promote the research among salespersons, and a graphic invitation was posted on social media to drive responses.

The first phase of this modified Delphi approach consisted of vast data from a qualitative open-ended survey on various themes, arguments, and curves. Multiple rounds of validity checks of data collection were conducted. As Goldstein (2002) suggests, the invitation message should be carefully written to avoid misunderstandings among the panelists and misrepresenting their opinions. Of the participants, 75 out of 83 were selected after detailed data cleaning based on the approximate location provided by Qualtrics and response quality.

In the second round of the research, an invitation email was forwarded to 75 people requesting their feedback on the first iteration and/or coming to an agreement with the current competencies for salespersons to engage customers in the store. After multiple reminders and personal follow-ups, 31 people responded to verify the findings.

The first stage in Delphi research formed three groups: salespersons with three or more years of experience, salespersons with leadership experience, or salespersons with both. The participants represented a wide range of experiences. They were in different stages of their careers, which was beneficial to support the study findings since they lived through the challenging shifts and experienced the change over time themselves.

Participants in the subsequent round were asked to confirm the uniqueness of the findings with additional options: to accept it as it is, to change it, to add more ideas, to rename the competencies, or to reject the competencies. Following Linstone & Turoff's (1975) recommendation, the participants were presented with clear, detailed information about the expected inquiry. After careful interpretation, the collected information was analyzed to avoid any mistakes in participants' opinions, omissions, and ignored items. There were some challenges, including time constraints, but overall attrition was around 41% based on 75 final participants and 31 retentions over the two-round Delphi study. Moreover, the research participants were identified following the procedural recommendation of the Delphi exercise (Listone & Turoff):

- The participants were informed with the rounds of questionnaires and information feedback.

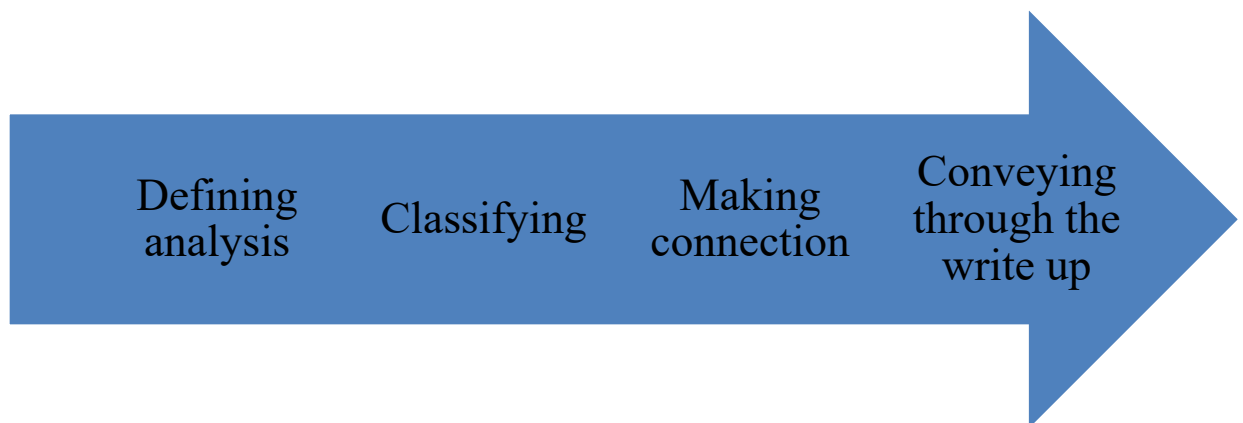
- The source of suggested items, such as a number of people's geographical locations without specific details, was identified through Qualtrics and analyzed through geospatial analysis.

Data Analysis

The Delphi approach is best used in futuristic development to acquire subjective judgment. As Baptiste (2001) mentioned, there are four phases of qualitative data analysis regardless of which field of practice or discipline the study has been conducted. The phases are listed in Figure 3-6.

Figure 3-5

Four phases of qualitative data analysis (Adapted from Baptiste, 2001).



As researchers, we must make philosophical, contextual, and design considerations of the research, according to Baptiste (2001). For this study, philosophical consideration is important to meaningfully transfer my system of values as a researcher and ideological stance. The purpose of this research is clearly exploratory, to deeply

understand the phenomenon through the lens of competencies. The research is designed to identify the competencies of retail salespersons to engage customers in the store, which is necessary now and might evolve in the future. To address the Facticity (Baptiste, 2001), the research considered salespersons acting as an agency, and through their consciousness, they are creating a change. How does research ensure minimized risk of research becoming directional propaganda? Baptiste (2001) recommends focusing on replicability, reliability, and objectivity.

In this research, the discussion often includes the impact of computers on qualitative research, as Baptiste (2001) identified. The modified Delphi study's initial phase, inherently qualitative, demands a deep understanding of the phenomenological method for interpreting data. The research employs a 'hermeneutic' approach, delving into employees' experiences in the home improvement retail sector instead of their explicit knowledge, a concept discussed by Solomon (1988) and Lopez and Willis (2004). This subjective theme aligns with Heidegger's hermeneutic interpretive tradition and focuses on participant understanding.

Thematic content analysis was performed using NVIVO to scrutinize the gathered information. This involved initial and subsequent second-level coding to unearth common themes, reduce redundancy, and classify data based on action verbs. Competency categories, including knowledge, skills, attitudes, and other attributes, were defined and used to mark diverse data types from surveys, encompassing elements like numbers, symbols, words, phrases, and themes (Baptiste, 2001). Ensuring analytical rigor, secondary coders, and experts in the subject matter aided in achieving intercoder

agreement through evaluating surveys and eight interviews. Dr. Israa Samarin and Dr. Michele Welliver supported the research as the second coder. The intercoder reliability was checked, and further discrepancy was explained and discussed until the coders and researcher agreed on certain competencies. The codes were then further refined to competencies based on Dr. Aileen Zaballero and researchers' discussion and analysis of each competency based on measurable or observable action items. The codebook was meticulously cross-referenced with the coded data to resolve inconsistencies and achieve consensus.

The study's second phase incorporated these insights to enhance dialogue and comprehension. The third round involved a quantitative questionnaire, designed based on earlier findings, to reevaluate the consensus between salespeople and customers regarding specific competencies. A compilation of performance competencies and requisite skills was prepared and disseminated among participants. In the Delphi study's final round, this compilation was presented on a Likert scale for customers to prioritize competencies regarding their engagement.

Across the Delphi study's three stages, a detailed summary of salesperson competencies was formulated and included in the results section. A key goal of this study is to reach a consensus among participants by assessing the variation in responses across several rounds, following the methodology suggested by Rowe and Wright (1999). Epistemology deals with nature, source, and the process of knowledge and knowing. The research aims to produce a list of competencies, which is not an absolute truth but rather a list with defensible perspectives based on current data. The findings will contribute to

the social construction of retail salespeople individually and as an organization to prepare salespersons to be successful in engaging customers. The research considered that the data were collected through directly accessible senses, and as a primary researcher and experienced person in the field, the researchers included previous experience to make readers aware of possible biases. As previously experienced in the in-home improvement retail industry in one of the top organizations, the research paper will actively pursue bracketing while analyzing the data to keep the researcher's perceived notion of the competencies from influencing the findings. Using second and third coders and constant feedback from subject matter experts in the analyzing team helped the research paper avoid bias in the findings. The careful consideration of the participants with a broad range will be meaningful to generalizing the findings and maintaining the axiological goal.

Trustworthiness and Confirmability

Developing new instruments required considerable time investment and involved a multi-step process of both creation and evaluation, essential for effective data collection. As detailed by Radhakrishna (2007), this process included the iterative refinement and testing of various questionnaire versions to avoid measurement errors. The initial stage involved defining and honing the questionnaire's purpose, objectives, research questions, and hypotheses, informed by extensive literature reviews and observations. These preparatory rounds 1 and round 2 laid the groundwork for the

construction of the final survey questionnaire. Multiple subject matter experts and reviewers reviewed the survey pilot tested with professionals to establish face, content, construct validity, and internal consistency and reduce measurement error (Harvey et al., 2020; Radhakrishna, 2007).

The first two iterations of the questionnaire were designed to identify critical competencies needed for effective customer engagement in retail settings and to anticipate how these competencies might evolve. Here, the competencies of sales personnel were regarded as the independent variable, while customer engagement was considered the dependent variable. The objective was to isolate specific competencies crucial for effectively engaging customers.

An interval scale was employed to select from not at all important (1) to significant (5) on each behavior, knowledge, skill, attitude, and other attributes indicator from the first two rounds. The third iteration of the quantitative questionnaire was developed, including 63 knowledge, skills, behavior, attitude, and other attributes derived from 269 initial codes into 11 broader competency categories, including eight evolving competencies to master for retail salespersons.

The credibility of qualitative research needs to address four key areas, as explained by Caelli et al. (2003, p. 5),

1. Researcher's theoretical positioning
2. The congruence between methodology and methods.
3. The strategies to establish rigor
4. The analytic lens through which the data are examined.

Theoretical positioning refers to researchers' motives, presuppositions, and personal history, subsequently shaping their motives and engagement with the study topic. It is important to become neutral and "bracket" personal values and prior knowledge in the substantive field, but questions still arise as the interpretation of the hermeneutic approach requires utilizing the researcher's experience (Caelli, 2003; Lopez & Willis, 2004). The methodology reflects on beliefs about knowledge and existence that arise from the values of philosophy framework, and methodology represents the framework that guides how the research should proceed (van Manen, 1990; Guba & Lincoln, 1994), and a lack of clarity can be problematic in deriving the result from qualitative study. The qualitative study must use rigorous methodologies with in-depth knowledge and adherence to the principles. Moreover, finally, through the analytic lens, an understanding of ontology and epistemology was developed, with underlying assumptions to guide every aspect of the study. Trustworthiness and confirmability are critical concerns that must be addressed to retain the credibility of the research study.

The philosophical standpoint also makes it very clear that the prior experience of researchers and perceived preconceptions have an impact on the study result, and researchers should consciously and strategically address prior expert knowledge as well as personal biases (Natanson, 1973; Lopez & Willis, 2004). The researcher worked on this topic for years, developing a research plan, collecting data, and identifying and understanding skills, which has been listed as environmental scanning in the research step. The researcher explored the environment previously as a store manager; therefore, the instrument for bringing both viewpoints together, from expertise and experience, is

reliable. The measuring instruments have been examined and validated by several peers and subject matter experts in different steps and checked for validity depending on whether they are measuring what they are designed to measure. The salesperson's selective criteria confirm the validity and reliability of the data gathered through surveys.

The research considered the opportunity to increase trustworthiness by four criteria defined by Lincoln and Guba (1985): credibility, transferability, dependability, and confirmability. The multiple-round Delphi approach allows participants to have a copy of the gathered information. The triangulation was confirmed by the data sources, which were collected from multiple groups of sources across the USA. Integrated reliability was checked by utilizing knowledgeable peers in the same field for the doctoral dissertation, the instrument went through a rigorous scrutinizing process of feedback and review by peers. An audit trail was maintained throughout the study, which can be traced back to each data point. Finally, a codebook was generated to develop an emerging coding structure while analyzing the collected information, maintaining confidentiality and anonymity. A reflexive journal was maintained using a personal 'Notebook' to memo all the information about self and method, which will be instrumental in ensuring trustworthiness (Lincoln & Guba, 1985).

In both qualitative and quantitative parts of the study, various procedures were used, including a pilot test, a panel of experts, geospatial analysis, and an IP address check to confirm the overall trustworthiness. The Delphi research evidence reveals that unstructured interacting groups or equal-weighted stable groups result in better judgment (Rowe & Wright, 1999). The outcome was communicated anonymously, which assisted

in validating the findings and avoiding the potential of 'halo effect' dominance by high-profile group members (Barrett & Heale, 2020). To avoid domination by quantity or the bandwagon effect, diverse information such as gender and demography was collected to protect the validity of the results.

Disagreements among participants were documented as well, if necessary. The data analysis procedure addressed more thorough phenomenological research criteria to prevent subjective judgment on a collective bias, which directly influences the reliable and trustworthy outcome. The quantitative Likert scale survey was reviewed by experts before pilot testing; some of the internal errors were checked:

- Poorly stated questions
- Ambiguous questions
- Instruction clarity
- Overlapping responses

After several revisions, the quantitative analysis underwent a pilot test with eight respondents to check for reliability. Suggestions were gathered based on the following points: a) Is the question valid? b) Does the question represent content? c) Does it look like an instrument? Evaluation and modifications were made based on the results of this field test and expert feedback. Notably, the pilot study sample was excluded from the primary research subjects. A few of the planned steps helped to receive responses, which are the following:

- 1) Respondent friendly questionnaire
- 2) Multiple contacts via email and social media

- 3) Thank you email after completion, and in some cases, a token of appreciation
- 4) Personalization

In order to validate the instrument, the third iteration ratings were used to calculate the scale's internal consistency based on Cronbach's Alpha (Watkins, 2017; Huck, 2000; Stines, 2003). The measure of internal consistency for the psychometric validation threshold is .70 or higher for Cronbach's Alpha, recommended by Taber (2017). The reliability of the quantitative survey, as indicated by a Cronbach's Alpha value of .968 for 63 items (with one item excluded due to insufficient responses), confirms the instrument's reliability since this value is higher than the .75 benchmark, suggesting minimal measurement errors in the cognitive domain. A .968 alpha also suggests some redundancies to address. However, considering the context of this study and multiple analysis perspectives, some redundancies are visible and addressed through the data analysis. Overall, the questionnaire was verified following a five-step process, as outlined by Radhakrishna (2007): a) background, b) questionnaire conceptualization, c) format and data analysis, d) establishing validity, and e) establishing reliability, which ensured the creation of a valid instrument, enhancing the quality of the research.

Summary

Chapter 3 provided an overall view of the research methodology, details on the modified Delphi approach, data collection preparation and procedure, data analysis plan, and finally, details on validity and reliability. The following chapter will discuss the findings following the data collection procedure and reflect on the results.

Chapter 4 Findings

Introduction

The competency exploration in this study followed a three-step process: construction, deconstruction, and reconstruction. Initially, the construction phase involves gathering and compiling a wide range of information, data, concepts, or elements; in this step, the research identified over 269 codes based on skills, knowledge, abilities, behaviors, attitudes, and attributes. These lists were then thoroughly analyzed to identify similarities, differences, and key themes in this deconstruction phase to discern similarities, leading to the formation of a preliminary competency inventory. This chapter delves into deconstructing and reconstructing the competency inventory based on the analysis results and shares the process of reassembling the deconstructed elements in a new, more coherent form based on the insights gained during the deconstruction phase. Chapter 4 will provide an in-depth discussion of the findings, including reliability and validity measurements from the three rounds of modified Delphi iterations. In these iterations, 269 competencies went through margining and a thematic round of coding based on similarities. Finally, they came down to 56 behavioral measurable and observable indicators, which were categorized into 11 functional clusters, with a quantitative analysis based on feedback from a customer participant further refining these competencies as shown in Table 4-1.

Table 4.1

Basic Steps of The Modified Delphi Process

Purpose of the Modified Delphi Process	To explore and forecast the competencies for salespersons to successfully engage customers over the next few years.
Research model	Three iterations modified Delphi, where the instruments are developed based on the literature review and prior Delphic findings.
Panelists selections	Purposive convenient sampling mixed with a snowball approach
Sample size	Dynamic (Iteration #1 =83 participants, Iteration #2=31, Iteration #3=45)
Measurement	Qualitative analysis using NVIVO, Quantitative analysis using SPSS
Unit of analysis	Competencies based on measurable or observable knowledge, skills, abilities, attributes, or behaviors
Survey administration	Surveys were distributed and collected electronically using Qualtrics.

Review of The Study

The purpose of the study was to explore salespersons' competencies required to successfully engage customers in the store. The research determined to consider both salespersons' and customers' perspectives on necessary skills, knowledge, behavior, attitude, and other attributes to increase customer engagement at present and in the future. The study sought to answer the following questions:

1. What competencies directly or indirectly impact customer engagement in the home improvement retail business?

2. How are customer engagement-related competencies expected to evolve in the near future?
3. Determine the most influencing competencies on customer engagement in home improvement retail stores.

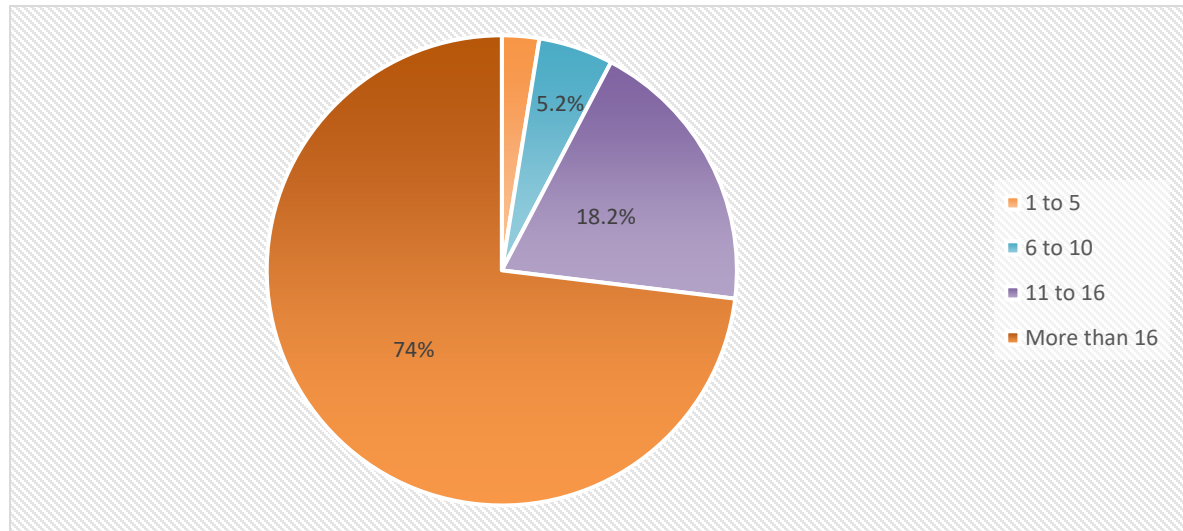
Overview of the Participants

Data From Round 1

This study conducted rigorous preparation and data cleaning to ensure sample consistency. Participants were recruited through social media channels such as LinkedIn and Facebook, as well as through email networks. The survey instrument was refined through several rounds of review and validation by subject matter experts. Initially, 83 participants completed the survey, with 75 qualifying for the second round. Of these, 31 completed both the second and third rounds, resulting in a 41% response rate for the second round. The participants were retail salespeople in home improvement businesses, aged 18 and above. The majority of them, about 98%, had at least four years of experience in retail sales, and 74% held leadership or managerial positions in a department of more than 16 people departments. This demographic distribution provided a rich and experienced perspective. Figure 4.1 shows the size of the team each participant manages in the retail home improvement stores.

Figure 4.1

Size of the Team Participants Lead.



The sample's gender distribution was well-balanced, with 50.6% of participants identifying as male and 49.4% as female. This equitable representation is detailed in Table 4-2, which clearly summarizes the demographic characteristics observed in the first round of the study.

Table 4-2

Demographics of Participants

Gender	Years of Total Experience	Size of Team Lead
Male 50.6%	4 to 10 Years 37.7%	1 to 5 people 2.6%
Female 49.4%	>10 Years 62.3%	6 to 10 people 5.2%

		11 to 16 people 18.2%
		>16 people 74%

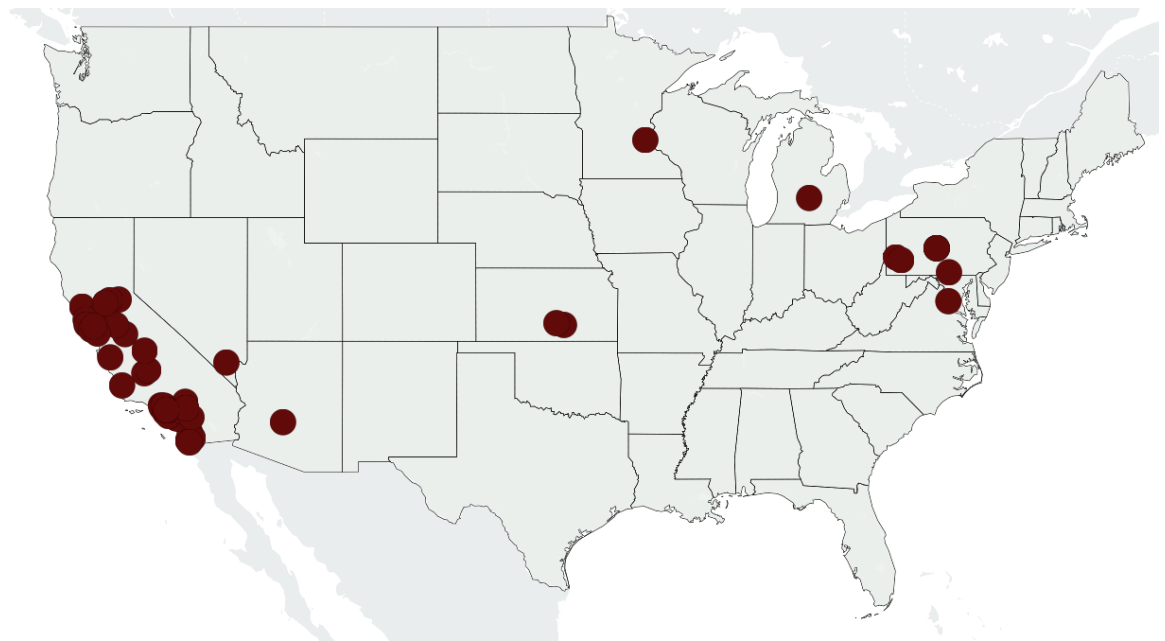
To validate the collected data further, the researcher accumulated IP and location information from Qualtrics and analyzed the IP addresses to ensure no repetition of sources. This review confirmed that each response originated from a unique computer system. Qualtrics automatically checked the following: Respondent finished abnormally fast, poor 24-hour completion rate, poor overall completion rate, an ambiguous text, pattern of unanswered questions, and straightening. Overall, data response quality was good, and there is no concern about the automated quality checks through Qualtrics.

The research then incorporated longitudinal and latitudinal data provided by Qualtrics for geospatial analysis, ensuring a good representation of participants across the USA and removed participants from outside the USA due to the failure to meet established criteria. Geospatial analysis added a rich, spatial dimension to the research, enhancing the reliability of the data by illustrating diverse subjective opinions from different parts of the country (figure 4-2). Integrating geospatial analysis into this method can provide a rich, spatial dimension to the research. The geospatial map utilizes a direct and interactive graphical interface to visually present the data sets and visually communicate the result of data exploration, which involves information that is tied to specific geographic locations, and can offer insights, which in turn enhances data reliability. It is important to understand that personal opinions from different parts of the

country can differ, and a well-represented data set should represent a major portion of the USA. As Figure 4-2 shows, the participants came from a wide range of areas in the USA.

Figure 4-2

Geospatial Analysis of Data Sources



Initially, the goal was to gather responses from at least 30 individuals, but findings were saturated after receiving 50-55 responses with repeating responses for the data to complete the qualitative phase. The researcher went through a cleaning and scrutinizing process to ensure the data accurately represented home improvement organizations within the USA and met the criteria for data analysis such as years of experience and geospatial location. For example, data from a participant with experience

at LOFTS, which does not align with the home improvement sector, was excluded from further analysis. It is, however, significant to note the racial demographics majority are white or Caucasian, with only two exceptions. The only personal information collected was the email address of the expert panelist, for communication and consensus-building purposes.

A second study round provided the participant an opportunity to add more information, edit the current information, or remove the existing competencies for the present and for the future. Based on the responses, the study findings confirmed that the participants agreed with the data and had nothing more to add. First-round participants were invited based on purposive sampling and snowball sampling through social media and personal networks. The same experts were invited for the second round through email and a new questionnaire with tentative competencies listed. Of the participants, 75 (out of 83) were invited for the second round, and 31 completed the second iteration instrument. The response rate decreased in the second round, with 41% of participants responding, which is a satisfactory retention rate considering electronic communication for the Delhi study (Hall et al, 2028). This comprehensive approach to data collection and preparation has been critical in ensuring the validity and reliability of the research findings.

After thematic analysis and developing competencies cluster and related skills, knowledge, abilities, and other attributes, a new instrument was developed for the customers, to share their preferences to develop a comprehensive list of competencies for retail salespeople to engage customers in the home improvement industry. A total of 45

data was collected, 41 of those data qualified for further analysis after data cleaning, which will be reported in the findings section.

Findings from Iteration 1 & 2

Out of 83 participants, 77 completed the survey, and 75 were selected for further data analysis. Thematic analysis was conducted to code each survey. Following the Hermeneutic approach, each data was coded based on their interpretation of the event, seeking the meaning of the text rather than quantifying variables following open coding. The researcher's previous experience helped to understand and assign codes as necessary, ensuring that additional information was not added. In the second and third rounds of axial coding, the data started coming into shape, and relationships were identified with the competencies of retail salespersons and engaging customers in the home improvement stores. To begin the content analysis, each category was defined using the operational definition discovered in the literature review. Two additional coders coded the same interviews, and an intercoder reliability check was established during this phase, where coders coded blindly without a codebook, and coders were strategically chosen due to their expertise; one coder is an expert in human resource development and agility, and a second coder is an expert in sales training and development. After analyzing 8 interviews, the researcher completed the agreement check. For example,

Coder 1 coded “Being aware of customers' needs, providing contactless services, being patient to meet customers' expectations, providing full-range services, greeting customers in stores, taking care of customers in stores.”

Coder 2 coded, “Awareness of customer safety and convenience, tackle the challenging situation, remain calm, composed, and use reasonable judgment. provide efficient service timely manner.”

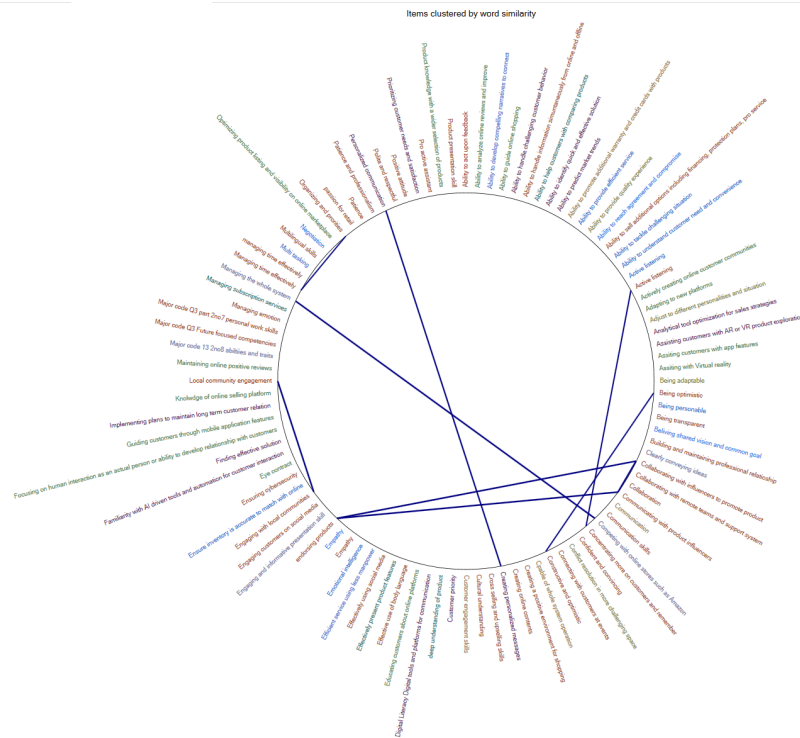
Coder 3: “Providing excellent customer service”

Based on our discussion, we have added an act of greeting to the missing code list. In 8 interviews, we identified 10 specific code disagreements based on open coding and communicated until all the coders reached an agreement. Due to open coding without a shared codebook, each coder had a different strategy to tackle the coding system based on themes and forwarded the new codebook for the next level of analysis (figure 4-3).

By the end of the first round of thematic coding, 269 ideas had been developed, and NVivo was utilized to identify similarities, with manual comparison before axial coding (figure 4-3) Initially, the findings were coupled with similar concepts and characteristics using NVivo to get a holistic perspective of the findings (figure 4-3). The final result of this analysis consists of a list of skills, knowledge, behavior, attitudes, and other attributes and has been descended into the 11 major competencies.

Figure 4.3

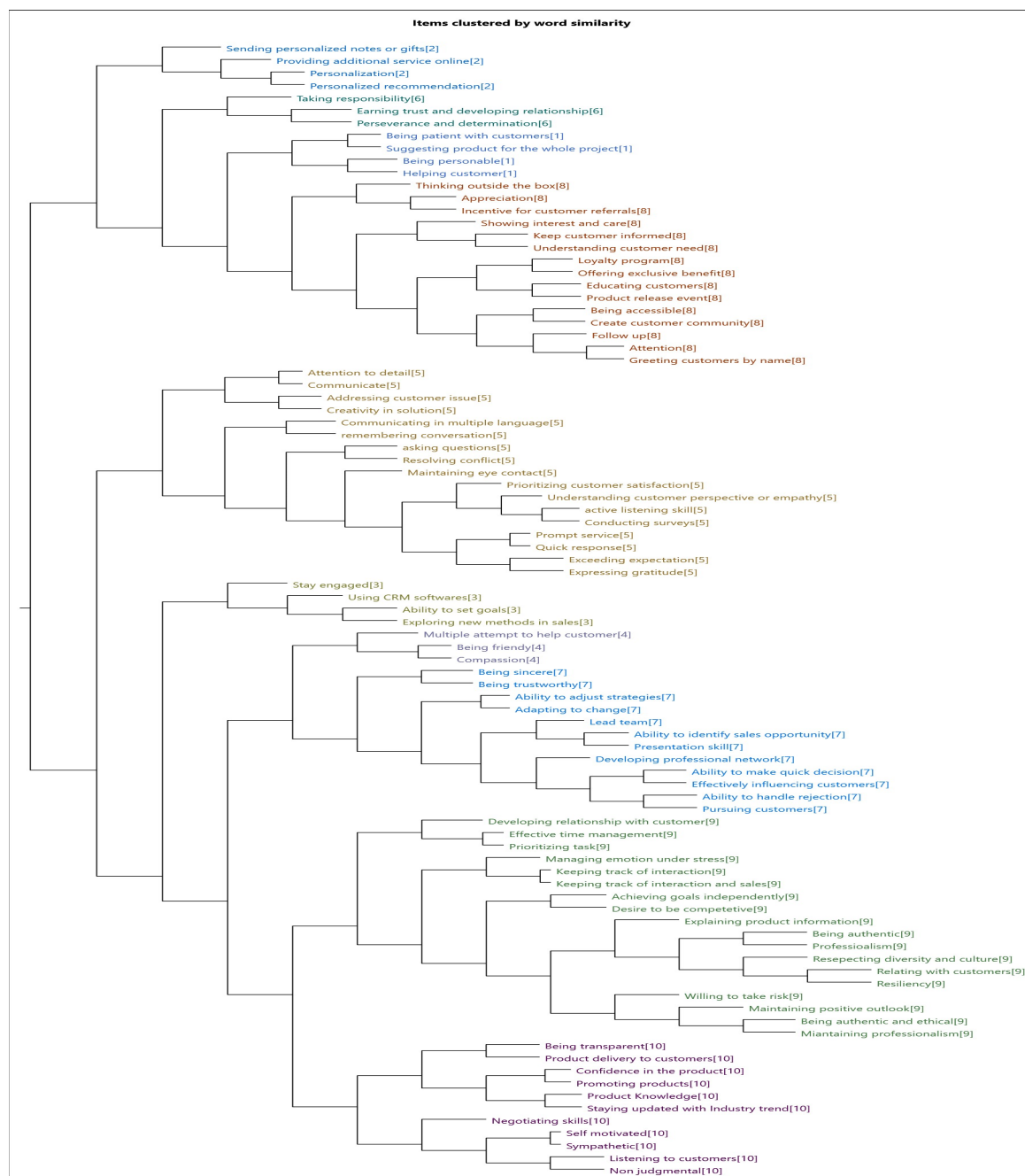
Item similarity cluster analysis through NVIVO



The initial study started with reading the data multiple times and assigning codes based on the findings. Figure 4.4 presents a visual representation of the codes, categories, and themes that resulted from word similarities analysis through NVivo, where the data started coming into shape as research found some similarities around ideas and how the competencies are defined for salespersons.

Figure 4-4

Item Clustered Based on Similarities



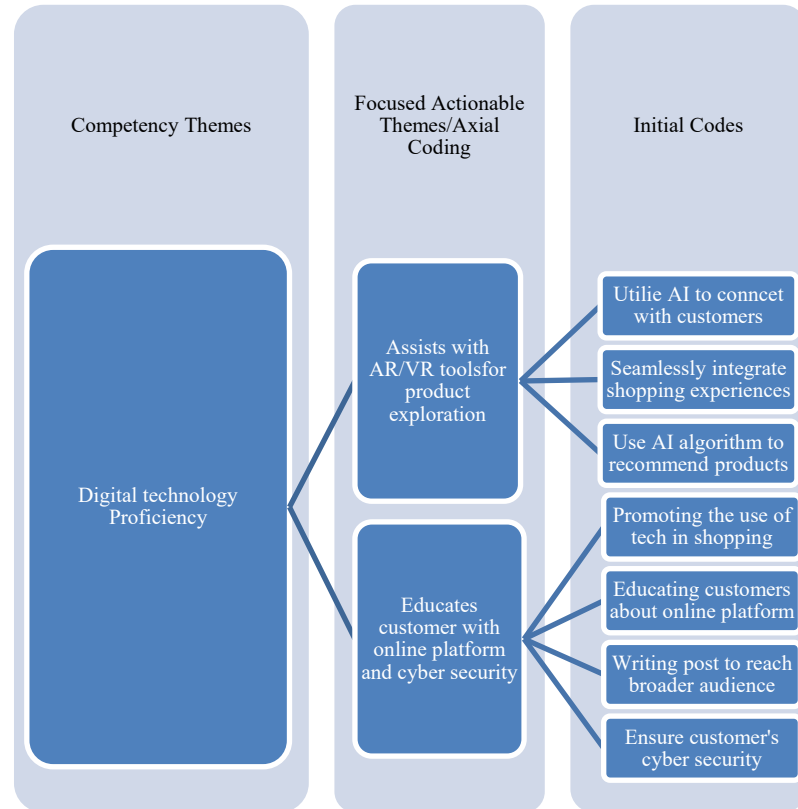
After generating some ideas through the similarities check and data cluster, the researcher started working on the second or axial coding through the manual process using NVivo. Since it is an open coding, tips from Baptiste (2013) were followed on each step:

- The researcher's approach encompassed four key areas: information assessment, people involved, contextual understanding, and analysis of the phenomena under study. Initial coding was directly aligned with the research questions, with most questions being addressed straightforwardly and negating the need for additional queries.
- In the early coding phase, a focused approach was assumed. Coders concentrated on developing specific attributes and properties, deliberately avoiding generalized coding to maintain a detailed perspective.
- Axial coding was pivotal for synthesizing insights. This stage involved a critical examination of ideas, leading to the development and refinement of codes. This process was characterized by constant comparison and the elimination of redundant codes.
- Throughout the research gave particular attention to maintaining an unbiased perspective, ensuring ethical integrity in reporting, and adhering to the correct epistemological framework. This vigilance in identifying relevant codes was supported by intercoder collaboration, enhancing the quality and validity of the findings.

- During axial coding, clarity was achieved in defining each category. This clarity emerged through discussions with subject matter experts, rigorous comparison, refinement, and an expanded review of literature to integrate new data effectively.
- The research outcomes were both comprehensive and succinct, striking a balance between detail and brevity.
- Finally, the researcher meticulously documented each stage of the process and the analytical results using digital tools such as 'OneNote' and 'NVivo', ensuring a thorough and traceable research journey. An example of the initial codes, axial code, and competency themes are provided in Figure 4-5.

Figure 4.5

Sample Coding and Themes from The Analysis



The second iteration instrument and manual data analysis listed 75 data after removing the repetition of ideas, developing focused actionable behavior, skills, knowledge, abilities, or attitude, and combining them into a broader theme. At this stage, a second round of data collection took place to develop a consensus around competency themes from the clusters. All the respondents accepted the current list of competencies, and no follow-up was required based on discrepancies.

Eleven clusters were developed, and competency statements were reorganized and reformulated to become more concise. Each step of the process was done carefully, and a

systematic record of various decisions, procedures, and activities during the research process was maintained for the audit trail. After the second iteration, and data cleaning and refining, an extensive list of competencies and a relatable, actionable list of knowledge, skills, behaviors, attitudes, and other attributes have been developed (Table 4-3). Each of the competencies has been further developed to establish a definition of each competency and related measurable and observable identifiers.

Table 4-3**Retail Salesperson Competencies and Competencies Cluster**

Localization of product (Regional product tailoring)	Innovative and Problem solving	Emotional intelligence	Digital and technology proficiency	Customer relationship management	Competency Dimension
Adjust price based on market	Handle rejection and setbacks	Is compassionate to customer's needs	Assists with AR/VR tools for product explorations	Listen, understand, and responds to customer's need	A
Connects with you at events outside regular businesses	Identifies solutions by thinking outside the box	Is attentive with corresponding	Educates with online platforms and	Builds and maintains strong professional	B
Tailors offers based on what your community needs	Resolves your problem calmly and quickly	Solves problems in challenging	Integrates online and offline	Creates a positive shopping environment	C
Engages in local events	Shows interest to customers by asking legitimate questions	Share experiences and common	Uses digital tools and platforms	Follows up after sales	D
	Solves customer's complex problems with ease	Takes responsibility for the	Manages relationships effectively	Prioritizes customer satisfaction	E
		Manages emotion under		Shows gratitude for customer's contribution to	F
		Is non-judgmental			G

Promotion and marketing	Product Expertise	Outcome driven skills	Online Marketing	Negotiation and sales skills
Delivers compelling sales presentations whenever you need a product	Is confident of product knowledge	Is detail-oriented	Collaborates with influencers customers follow to endorse the products for home	Explores new methods and techniques to convince customers
Keeps you informed with new products and services	Explains all aspects of the products	Is creative in finding a solution	Share ideas with customers through online content on various platforms	Hands product to customers in person every time
Has testimonial, and positive reviews from satisfied customers	Personalizes products based on customer' s need	Manages time effectively	Maintaining connections online outside the store	Helps customers purchase additional products that may need for the project
Promotes additional services such as credit card, warranties	Stays updated with industry trend to support	Provide accurate information about inventory	Manage and enhance online reputation through positive interaction	Satisfies customer' s needs every time they visit the store
	Makes recommendations from another	Provide consultation for the entire project across various departments	Asks for customer' s positive feedback online	
		Is motivated to help		

Values and ethics-based	Is authentic, ethical, and transparent in all interactions	Is trustworthy	Respect diversity and cultural nuances	Understand and explain the ethical implications of			
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Findings from Iteration 3

Salesperson Competency Necessary Considering Current Trends

In statistical analysis, the normality test assesses whether data follow a normal distribution. It was challenging to confirm normality when conducting this test with a small sample size, such as 41 data points. In this case, the data is not normally distributed as indicated by a significance level (p-value) less than 0.05 in the Shapiro-Wilk test except for digital and technology proficiency, negotiation and sales skills, online marketing, promotion, and marketing. This suggests that the data deviates from a normal distribution, a common occurrence with such limited data points. The small sample size may not fully represent the broader population, leading to skewed or non-normal results.

Table 4-4 shows the test of normality results from SPSS.

Table 4-4

Shows The Test of Normality of 41 Data Points.

	Tests of Normality					
	Kolmogorov-Smirnov ^a			Shapiro-Wilk		
	Statistic	df	Sig.	Statistic	df	Sig.
Customer Relationship Management	.135	41	.058	.906	41	.003

Digital and Technology Proficiency	.094	41	.200*	.948	41	.060
Emotional Intelligence	.130	41	.078	.937	41	.026
Innovative and Problem Solving	.154	41	.016	.875	41	<.001
Localization of Product (Regional product tailoring)	.091	41	.200*	.944	41	.044
Negotiation and Sales Skills	.099	41	.200*	.963	41	.198
Online Marketing	.131	41	.074	.956	41	.111
Outcome Driven Skills	.145	41	.029	.891	41	<.001
Product Expertise	.167	41	.006	.918	41	.006
Promotion and Marketing	.100	41	.200*	.954	41	.098
Values and Ethics-based	.259	41	<.001	.791	41	<.001

*. This is a lower bound of the true significance.

a. Lilliefors Significance Correction

Once the data was categorized for each specific behavior, knowledge, skill, and attitude into distinct competencies, the research conducted a descriptive statistical analysis. This was done to ascertain the average preferences of customers by running a test for mean comparison across the various competencies (Table 4-5)

Table 4-5

Descriptive Statistics to Conduct a Mean Comparison Between Competencies.

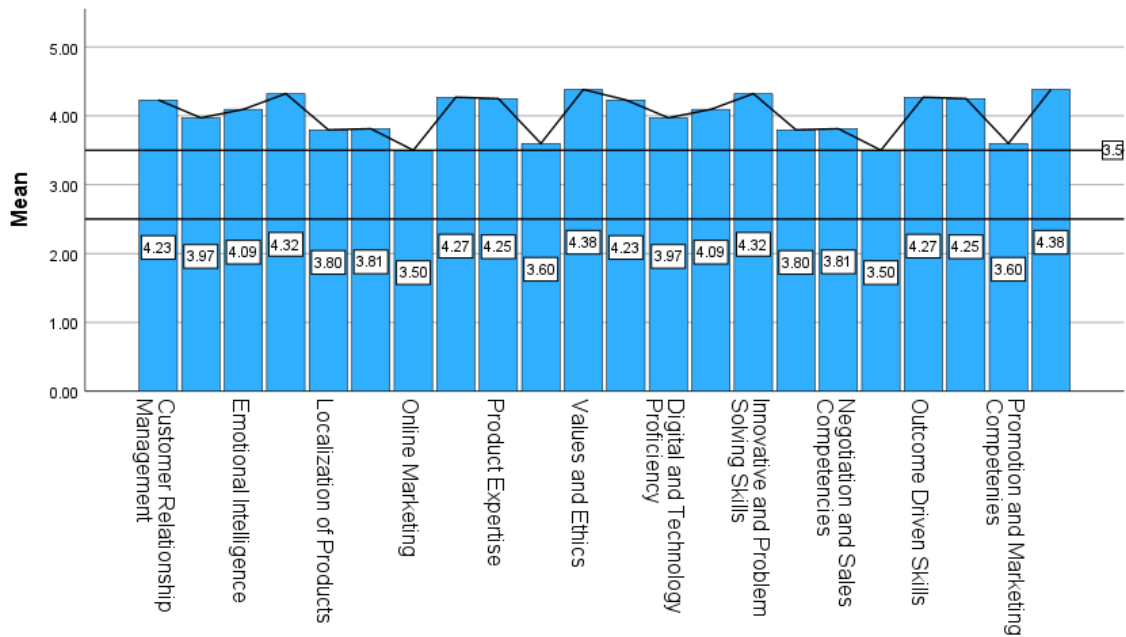
	Descriptive Statistics							
	N	Mean	Std.	Variance	Skewness		Kurtosis	
					Statistic	Std. Error	Statistic	Std. Error
Customer Relationship Management	41	4.2303	.66470	.442	-.707	.369	.188	.724
Digital and Technology Proficiency	41	3.9710	.73882	.546	-.523	.369	.430	.724
Emotional Intelligence	41	4.0935	.66087	.437	-.437	.369	.201	.724

Innovative and Problem Solving	41	4.3220	.66465	.442	- 1.178	.369	1.196	.724
Localization of Product (Regional product tailoring)	41	3.7967	.86076	.741	-.234	.369	-1.016	.724
Negotiation and Sales Skills	41	3.8122	.75725	.573	-.250	.369	-.248	.724
Online Marketing	41	3.4997	1.05128	1.105	-.443	.369	-.421	.724
Outcome Driven Skills	41	4.2700	.65042	.423	- 1.200	.369	2.231	.724
Product Expertise	41	4.2504	.59920	.359	-.561	.369	-.543	.724
Promotion and Marketing	41	3.5982	.97999	.960	-.456	.369	-.360	.724
Values and Ethics-based	41	4.3815	.70715	.500	- 1.384	.369	1.047	.724
Valid N (listwise)	41							

Based on the mean comparison, the customer preferences are visible. Mean comparison results are shown in Figure 4-6. Even though the salesperson identified 11 competencies cluster as important, from the customer's perspective, the most important competencies to develop are the value and ethics of the salesperson. Similarly, the next important competencies are innovation and problem-solving.

Figure 4-6

The Mean Average Comparison of The Customer's Responses



Salesperson Evolving Competencies for the Future

Iteration 1 &2 competency analysis and thematic coding provided a list of competencies important to watch for the future. Even though the competencies are similar, the observable and measurable behaviors are different. For example, in customer relationship management, it will be important to remember or keep track of customers to refer back to the previous conversation in retail. For digital and technological proficiency, the participants avoided speculating on AR/VR or higher technology. Rather the participants discussed effective communication using email, social media, and video conference tools.

Figure 4-7

Salespersons' Competencies are Expected to Evolve in The Near Future.

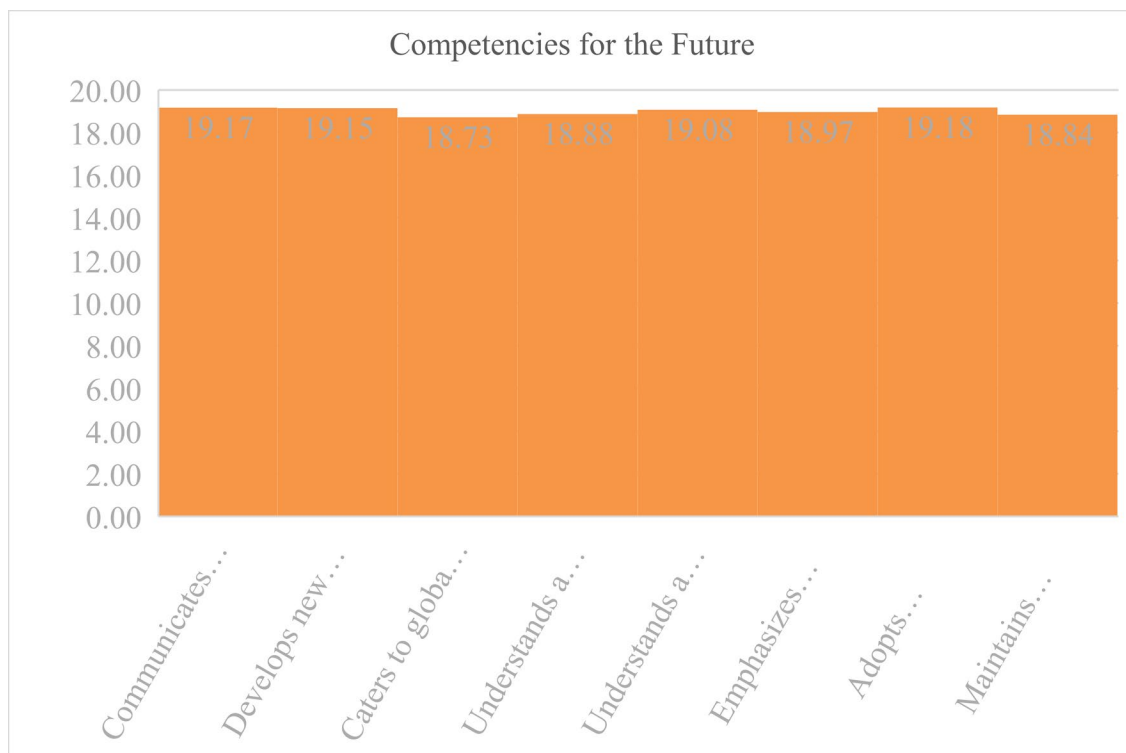
Salesperson's Evolving Competencies for the Future	Communicates effectively online
	Develop new skills and stay relevant and effective
	Caters global and diverse customer based on cultural understanding
	Understand and manages customer's emotions, going beyond just empathy and trust
	Empathizes and adaptable in changing environment
	Adopts customer centric approach, gains deeper understanding, and creates positive shopping environment
	Maintains positive reviews online on platform such as google for the home improvement retail stores.

After properly differentiating, eight specific changes were listed for customer feedback with a scale of not at all important to extremely important. From the customer's perspective, the priority shifted; at the same time, quantitative analysis provided an opportunity to analyze the result based on responses. The 41 respondents drive this result; a robust analysis can be completed with broader participants. The study also considered

the upcoming shifts in retail, and through this survey, the research wanted to reflect on the future changes from the customer's perspective, as shown in Figures 4-8.

Figure 4-8

Customer's Expected Shift in Competencies in the Future



In a comprehensive analysis of the future of competencies and customer expectations, based on round 3 data collected from 41 participants, the findings indicate a significant shift towards valuing communication effectiveness online as a key competency for future customer engagement. Despite the availability of advanced

technologies, customers perceive these competencies as increasingly valuable for the future. They emphasize the importance of developing new skills to stay relevant and adopting customer-centric approaches for a deeper understanding of customer needs. This perspective aligns with the importance placed on various competencies by salespeople, highlighting a consensus on the evolving competencies required to engage customers effectively in-store.

Thematic Analysis with Integrative Literature Review

In this section, each competency cluster is analyzed based on literature reviews after identifying themes from the data to match with existing literature, which will eventually help to determine observable and measurable skills, knowledge, abilities, behaviors or other attributes as indicators for each competency developed from this research.

Customer relationship management

Customer Relationship Management (CRM) is a crucial competency for retail salespeople to engage customers in the store. According to participants, the most notable identifiers under this competency cluster are listening, understanding, and responding to customers' needs; building and maintaining strong professional relationships; creating a positive shopping environment; following up after sales; prioritizing customer satisfaction; and showing gratitude for contribution to the business. These observable and

measurable behaviors based on established benchmarks can be identified through data analysis and later merged into a group based on their similarities.

The concept of customer management, as explored by Narver and Slater (1990) and Singh and Ranchhod (2004), has been linked to improved performance at both company and individual salesperson levels. Listening, understanding, and responding to customer needs are essential behaviors to engage customers in the store. As the participants were asked what they have witnessed as a notable example of customer engagement in the home improvement store, one of the salespeople responded:

Salesperson approached the customer first and maintained eye contact / engaging conversation. Asked them about the needs of their job and project and supplied them with solutions that meet those needs. Then continuing to follow up via phone or future in-person visits.

This relationship is further elaborated in the work of Cross et al. (2007), emphasizing the positive impact of salesperson customer orientation on performance to create a positive shopping experience. For salespeople to successfully establish, nurture, and sustain long-term relationships with clients, it is crucial to adjust their selling techniques flexibly. One of the techniques participants mentioned,

The easiest connections are built with people's children. A lot of people have anxiety taking children to a home improvement store because children get whiney

and bored, so when kids get involved with mixing their own paint, nailing their tree stump to a board at Christmas time, or doing a kid's workshop, parents feel much more at ease shopping with their children. This also builds future generations of home improvers.

This adaptability should span various sales scenarios, progress through different stages of customer relationships, and at times, even adjust within a single customer interaction to prioritize their satisfaction. As highlighted by Rapp et al. (2017), such an approach is essential in the dynamic field of sales, where understanding and responding to customer needs and preferences is key to maintaining enduring relationships. One of the responses from participants states:

Actively listen to the customer's needs, concerns, and preferences. Show genuine interest in what they are saying and avoid interrupting. This demonstrates that you value their input.

Adaptive selling is a critical concept in sales, encompassing the ability of salespeople to modify their selling approaches according to various sales situations and relationship stages. This skill is essential for establishing and maintaining long-term relationships with buyers. Research in this area, including works by Rapp et al. (2017), Weitz et al. (1986), and Spiro and Weitz (1990), has highlighted that adaptive selling can be both effective and ineffective, depending on how it is executed. The effectiveness of

adaptive selling is influenced by customer perceptions of the salesperson's intent behind their behavior changes during interactions. Adaptive selling can significantly enhance customer trust and relationship longevity when done correctly.

Digital and technology proficiency

Proficiency in digital and technology is becoming increasingly essential in sales operations. Technological advancements have simplified client interactions and improved organizational understanding of cost structures and customer profitability, resulting in more transparent marketing and sales strategies. This competency includes observable and measurable knowledge, behavior, skills, abilities, and attributes such as assistance with AR/VR tools for product explorations, education with online platforms and cybersecurity, integration of online and offline shopping experience, use of digital tools and platforms efficiently, and manages relationship effectively using technologies and software.

Sales professionals are transforming into 'knowledge brokers,' as defined by Verbeke et al. (2011), by combining their understanding of customers with corporate data to enhance relationship management and discover fresh prospects. The utilization of technology in this setting improves sales expertise, resulting in a significant impact on performance (Sharma et al., 2007). Participants explained it as cross-platform integration; one of the participants mentioned that “Cross-Platform Integration: Ensuring a seamless

experience for customers transitioning between online and offline channels” is a recently added responsibility for them while interacting with customers.

In the current environment, providing knowledge clients can receive from a website is key in addition to positive interactions, so they feel the need to come to the brick and mortar store as opposed to online based shopping.

In addition, technology is transforming the delivery of services in sales, and it's important to stay updated and educate others with the tools and development, and eventually help customers avoid tech management fatigue; according to Deloitte, all of that technology and connectivity took a toll on some consumers. According to a survey, about a third of US consumers (32%) say that, since the COVID-19 pandemic began, they have felt overwhelmed by the number of devices and subscriptions they need to manage (Auzzler & Silvergate, 2021). Due to this transformation, sales leaders must reassess the strategic focus of their sales team and modern methods of enhancing customer value (Blocker et al., 2012; Moncrief & Marshall, 2005). Competency can be broken down into multiple activities following Moncrief and Marchall's (2005) article into technology, communication, sales, relationship, team, and database-based activities. The article also reflected on evolving sales processes, which align with the research findings.

The proliferation of digital automation tools has resulted in a significant increase in the utilization of platforms like Teams, Zoom, and LinkedIn, which have had an

impact on the alignment and interactions between sales and marketing. For example, Lowes Home Improvement is the most active on the LinkedIn platform, and all the employees are continuously posting and bragging about big sales through the platform. This technological transition requires salespeople to operate in a manner like general managers, effectively managing resources both within and externally to fulfill customer requirements and effectively using the platform to increase customer engagement. This evolution exemplifies a wider pattern in which sales positions now involve overseeing extensive customer interactions, necessitating sales experts to possess proficiency not just in conventional sales methods but also in effectively utilizing and incorporating technology into their approaches.

Emotional intelligence

Emotional intelligence (EI) is a key competency for salespeople in the retail sector. It encompasses the ability to understand and manage one's own emotions, as well as the emotions of others. Based on the participant's responses, knowledge, skills, attitudes, behavior, and other attributes are compassion, attentiveness with corresponding body language, solving problems in challenging situations, sharing experiences and common connections, addressing anyone shopping with customers, creating interactive content, managing emotion under stress, being non-judgmental, and taking responsibilities. In retail, this means reading customer moods, empathizing with their needs, and responding appropriately.

Emotional Intelligence (EI) in sales is linked to better customer relationships, improved sales performance, and greater customer satisfaction. Salespeople with high EI can effectively navigate challenging customer interactions, adapt their communication style, and build customer trust. This ability to connect on an emotional level is especially crucial in retail, where personal interactions can significantly influence purchasing decisions. A great example of how a salesperson builds a strong connection comes out through the following experience of a participant:

The client replied with a meek smile, a hello and a just look. After about 10-15 minutes of the client roaming around the store, the sales associate approached the women again and asked if she was finding everything ok. It was at this time the associate could sense that she was uneasy. She broke the ice with "There are just so many choices in here; it can be really overwhelming." The women visible relaxed and said, "It really is." The associates spent some time chatting with her then and was able to help the women find what she needed, and the client left with what she needed and a smile.

Emotional intelligence in sales, as part of a comprehensive sales performance model, involves understanding and managing personal emotions and those of customers. Walker et al.'s (1977) model highlight various factors influencing sales performance, including personal traits, organizational environment, and motivation. Aptitude, encompassing personality, and mental ability, along with selling skills and personal

characteristics, contribute variably to sales success. This model underscores that conventional sales metrics alone don't fully explain performance, pointing to the importance of emotional intelligence in understanding and connecting with customers for effective sales outcomes.

An emotional intelligence competency involves the capability to identify, comprehend, and utilize one's own emotional insights, which contributes to effective or outstanding performance. Emotional intelligence for the retail salesperson can be divided into two distinct group: intrapersonal competencies and interpersonal competencies. Interpersonal competencies, for example, social intelligence competency, are the skills to recognize, understand, and apply emotional knowledge about others, leading to effective or exceptional performance. From the findings, compassion, attentiveness, solving problems in challenging situation, sharing experience and common connection, addressing additional people shopping with the customers, an creating interactive contents are all part of interpersonal competencies. Whereas managing emotion under stress, being non-judgmental, taking responsibilities for the outcome are considered as intrapersonal competencies. Lastly, cognitive intelligence competency encompasses the ability to process or evaluate information and situations, resulting in effective or superior performance (Boyatzis, 2008). These competencies are not mutually exclusive and often interact. For example, being non-judgmental can enhance one's ability to show compassion in interpersonal interactions, while effectively managing emotions under stress can improve problem-solving in challenging situations. The body language associated with these competencies plays a crucial role in how others perceive and

interact with us, making it an essential component of effective communication and social interaction.

Innovative and Problem solving

In the realm of sales, professionals are increasingly expected to collaborate actively with customers in crafting the service, subsequently bringing together various departments within the supplier's organization to ensure delivery (Sharma et al., 2007). This necessitates a closer alignment, or in certain instances, integration of sales teams with the R&D, operations, and supply chain sectors, especially in the home improvement industry. The key qualities identified by participants include handling rejection and setbacks effectively, pinpointing solutions, responding calmly and swiftly, engaging with genuine interest and pertinent questions, and tackling complex problems with ease. Further research supports the idea that salespeople can drive the transformation of offerings, which may extend beyond mere products and services to potentially revamp the entire business model of an organization (Sharma et al.).

According to Verbeke et al. (2011), a profound grasp of customer insights, an essential aspect of sales-related knowledge, is crucial for enhancing sales performance. Only with an in-depth understanding of the customer's business can meaningful and constructive discussions about their needs take place.

For sales organizations, embracing and effectively utilizing sales technology is becoming increasingly important. This technology, encompassing various tools and

techniques, is not just about performing routine tasks; it's about transforming materials, energy, and information into resources that bolster sales activities and amplify revenue generation (Agnihotri & Rapp, 2010).

Localization of product/ Regional product tailoring

According to participants' thematic analysis and axial coding, the identifiers for these competencies clusters are adjusting prices based on the local market, connecting with customers outside regular business, engaging in local events, and tailoring offers based on community needs. One common agenda is that this competency enables salespeople to prioritize local or regional areas and offer customized plans for the customers, making connections. For the home improvement industry, these competencies can add tremendous value by engaging customers, as one participants explained:

We have several contractors that we work closely with. There is a company that is building new 4 plex buildings in our town. Not only did our contractor sales help with all the blueprints, but he made sure all products came in at the correct times and made it a point to visit the customer on the site. He has more plans for projects in the future and will continue to purchase with us.

Negotiation and sales skills

Under this competency cluster, the identifiers explored are new convincing methods to convince customers, hand product on, helps purchase additional products, and

ensure customer satisfaction. This cluster refers to any competencies related to negotiating and making sales to a potential customer. Most participants indicated the ability to negotiate terms and conditions and effectively close deals.

I observed a salesperson help a customer that had an appliance delivered that was damaged and was very upset. This salesperson calmly and quickly was able to schedule the pick-up of the damaged appliance and reschedule a new delivery within a week of the original order. The salesperson was also able to refund the customer a small amount of money for being patient.

According to Sishakti (2015), the new ATD competency model, negotiation competencie are listed to help salespersons align all stakeholder interests and create a winning situation for all parties in the transaction, demonstrating mutual benefit, gaining commitment, and eventually closing the sale successfully.

Online Marketing

In the face of growing challenges from online competition and the impact of online reviews, brick-and-mortar retailers are finding that high-quality salespeople are taking on a new significance in the digital age. These skilled sales professionals are emerging as a vital factor for physical retail stores, not only to stand out among each other but also to distinguish themselves from their online counterparts. This development

highlights a transformative trend in retail, as seen in the works of Cross et al. (2007), Cuevas (2018), Ferguson et al. (2021), Hoyle et al. (2020), and Marshall et al. (2012). The concept of Multichannel Customer Management (MCM), as explored by Neslin et al. (2006), highlights the significance of strategically deploying and evaluating various channels while addressing the challenges of coordinating between online platforms and physical stores. This approach underscores the need for further research to comprehend the dynamics of this collaboration and its impact on customer behavior. Key skills identified for effective engagement include collaborating with influencers, sharing ideas and content online, maintaining communication beyond the physical store, and encouraging positive feedback to enhance in-store customer engagement.

Further research in this field, as outlined by Blattberg et al. (2008) and reiterated by Neslin et al. (2006), investigates factors like channel selection and customer migration. These elements are crucial for gauging the success of home improvement retail strategies. A deeper understanding of how various channels create customer value is essential. This understanding should encompass how these channels can synergistically support each other. Salespersons play a pivotal role in this ecosystem, enhancing customer engagement by developing and leveraging these competencies. Multiple participants asked for “Collaborating with influencers for product promotions and endorsements”, or “Building relationships through social media by sharing insights and engaging in conversations” as some important competencies to engage customers. They also indicated that they are engaged in “*Writing guest posts on relevant industry blogs to reach a wider audience*”, which supports this competency cluster for salespersons.

Outcome Driven Competencies

Outcome-driven competencies include detail-oriented, creative in finding solutions, managing time effectively, accurate inventory management, consultation skills for the entire project, and motivation. Sales professionals in home improvement retail stores must grasp customer expectations and cultivate skills that ensure precise inventory management. Competencies focused on outcomes are those that contribute to achieving positive results by efficiently organizing and handling inventory and the sales procedure. Participants highlighted the increasing competition from online retailers and the pressure on physical stores to enhance their capabilities in this area.

The biggest change/challenge is around the online sector. Competing with the timeliness of businesses such as Amazon while still delivering world-class in-store customer service has created new responsibilities for associates, such as pulling orders and maintaining in-stock information.

Product Expertise

Traditionally, field sales professionals were the main source of product and service information for customers. However, this role has significantly diminished with the advent of the internet since customers can now easily access information online (Sheth & Sharma, 2008). Consequently, basic tasks like information retrieval have become more efficient and are often more effectively executed by systems, challenging

the traditional role of salespeople as primary information providers (Rackham & de Vincentis, 1999).

Despite this shift, survey results from home improvement stores highlight the continuing importance of a salesperson's confidence in product knowledge, ability to articulate and personalize product information, stay abreast of industry trends, and make cross-department recommendations. Competency can be defined as the skill, knowledge, and abilities required to understand the detailed product feature to make recommendations to a customer with confidence, including personalized product recommendations, as necessary. Participants mentioned:

The ability to connect with people, and to come across as trustworthy. To be knowledgeable about what they are selling but not be overbearing.

These competencies are deemed crucial for engaging customers effectively. The surveys underscore the enduring value of product expertise in the home improvement sector and various related competencies. In addition to product knowledge, participants also emphasized the need for salespeople to learn and employ effective information-sharing techniques. One of the exemplary events they mentioned related to this competency is this:

Paint associate named Selina was assisting a young couple select paint for their new home. Customers had two young children and a toddler. Selina effectively

helped the customers select the correct paint for their project by properly qualifying the customer and correctly adding all necessary additional products.

Promotion and marketing

This cluster is one of the newly developed competencies that is not very common in literature reviews. Promotion and marketing competencies indicate the ability to present the product, receive positive feedback, and promote additional value to the sales. This competency is often called the point of sales promotion by the salesperson. Some competency identifiers are delivering compelling sales presentations, keeping customers informed about new products and services, maintaining positive reviews, and promoting credit cards, warranties, and other additional products in the store. Service employees, in their multifaceted roles during service encounters, embody not only the product and act as living advertisements, but their behavior also critically shapes consumer perceptions of the company and the salesperson-customer interaction (Pornpitakpan & Han, 2013). The participants mentioned,

Salespeople have an expectation and responsibility to promote the services and programs of the company. There is a heavy emphasis on sales and increasing the bottom line of the company. The promotion of warranty and credit card programs are expected of all salespeople.

Values and ethics

This is one of the most sought-after competencies and a growing topic of discussion for salespersons in the home improvement industry. The research identified this competency as the authenticity and trustworthiness of retail salespeople with respect to diversity, inclusion, equity, and a clear understanding of its impact on society. There are multiple behavioral and skill indicators under this competency's clusters, which are authenticity, trustworthiness, respect for diversity and culture, and understanding and explaining ethical implications. Participants mentioned:

Being personable is first and foremost. Being authentic, asking leading questions to uncover their needs, and listening are essential. When working with the public, it is imperative to be actively engaged. I did it daily in all of my management roles

Another participant mentioned a compelling story:

I was at a prospective client's house, and one of my employees was there with me; he struck up a conversation about them both being from Iowa, and I could see a bond of trust forming.

Amyx et al. (2008) developed five dimensions for a salesperson's corporate ethical values from the organization's perspective, which are general ethical behavior, ethics and success, tolerance of unethical behavior, punishment of unethical behavior for

personal gain, and finally, punishment for unethical behavior for the corporate gains (p. 387). Trustworthiness is one of the primary expectations from the customer from salesperson to develop a long-term buyer-seller relationship (Peterson & Lucas, 2001).

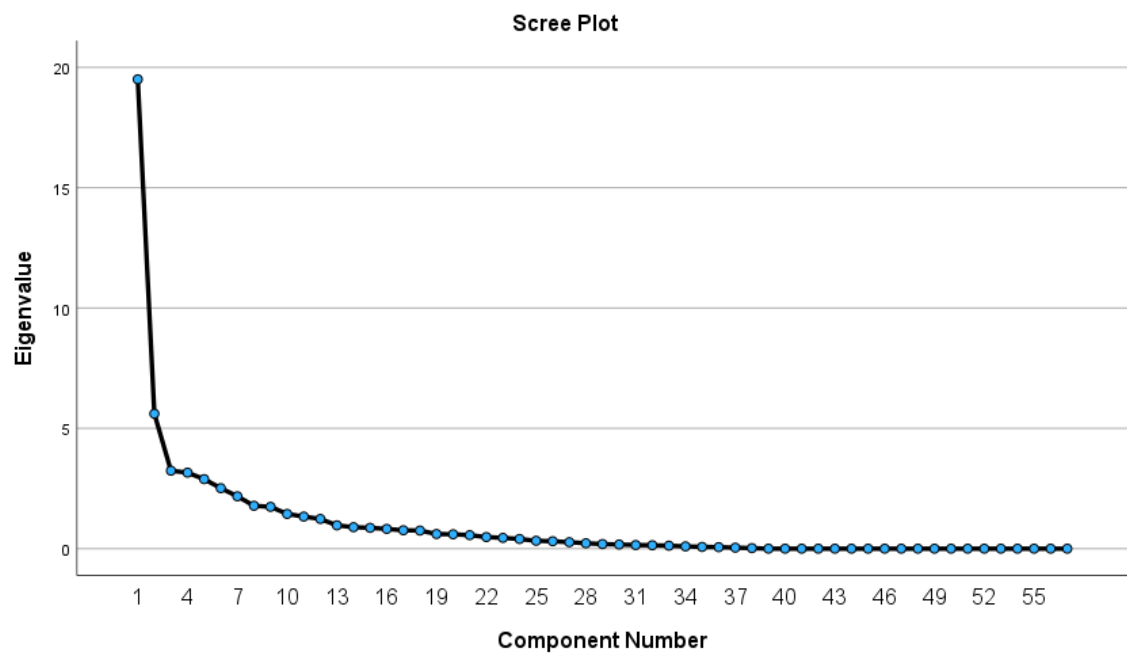
Data Dimension Reduction through Factor Analysis

To delve deeper into the quantitative data and discern the competencies required by salespeople, the study employed Principal Component Analysis (PCA) to analyze 57 competencies indicators and categorize them based on factor loading. This statistical technique aims to group intercorrelated variables to identify underlying patterns that may not be immediately apparent. The PCA was executed using the Varimax rotation method, with the retention of components guided by eigenvalues exceeding the value of 1. This approach aids in simplifying the complexity of the data by highlighting the most significant relationships.

The correlation matrix, a prerequisite for PCA, did not reveal any correlation coefficients exceeding 0.9. This indicates an absence of multicollinearity, allowing the analysis to proceed without considering eliminating any survey items. As illustrated in Figure 4-9, the scree plot graphically represents the eigenvalues associated with the components derived from the PCA. The plot suggests a discernible elbow after the 10th to 12th factor, indicating these components capture the most meaningful variance within the dataset (Figure 4-9).

Figure 4-9

Screen Plot for Factor Analysis



Communalities represent the proportion of each variable's variance that can be explained by the extracted factors. For most variables, a high proportion of variance was

explained, indicating that the factors extracted represent the data. The PCA extracted 12 components with eigenvalues greater than 1 before rotation, explaining 81.798% of the variance. After rotation, the cumulative variance explained was slightly adjusted across the factors. Building on the factor analysis, careful examination of factor loadings, theoretical justifications, and the consideration of cross-loadings led to the categorization of variables into 10 components. These reflect the customer preferences and are presented in the Rotated Component Matrix shown in Appendix D.

The extraction process converged after 21 iterations, signifying a stable solution with well-defined components. Each component represents a cluster of interrelated attributes, translating complex data into actionable insights regarding salesperson competencies.

Subsequent analysis compared the mean scores of indicator variables within each component, juxtaposed with customer preferences. This comparison facilitated the refinement of the competency inventory by eliminating factors with considerably low mean scores. The refined list of competencies, which reflects the essence of the salesperson's role, is depicted in Figure 4-6.

Table 4-6

Extracted Factors and Rotated Components.

Group	Competency Indicators	Cronbach's Alpha
Proactive relationship management	Share ideas with you through online content on various	.939 (n=13)
	platforms.	
	Explores new methods and techniques to convince you.	

	<p>Maintains communication with you outside the store.</p> <p>Engages in local events.</p> <p>Collaborates with influencers you follow to endorse the products for your home.</p> <p>Connects with you at events outside regular businesses.</p> <p>Promotes additional services such as credit card and warranties.</p> <p>Tailors offers based on what your community needs.</p> <p>Manages relationships effectively using technologies and software.</p> <p>Creates interactive content to engage in conversation.</p> <p>Follow-up after sales.</p> <p>Shows gratitude for your contribution to business.</p> <p>Asks for your positive feedback online</p>	
Ethical and customer-centric service	<p>Is authentic, ethical, and transparent in all interactions.</p> <p>Is non-judgmental.</p> <p>Provide accurate inventory information.</p> <p>Adjusts price based on local market.</p> <p>Takes responsibility for outcomes.</p> <p>Is confident of product knowledge.</p> <p>Listens, understands, and responds to your needs.</p> <p>Is trustworthy.</p> <p>Handles rejections and setbacks.</p> <p>Identifies solutions by thinking outside the box.</p> <p>Explains all aspects of the products.</p> <p>Integrates online and offline shopping experiences.</p> <p>Addresses anyone shopping with you, including kids</p>	.925 (n=13)
Consistent customer satisfaction	<p>Satisfies your needs every time you visit the store.</p> <p>Solves your complex problems with ease.</p>	.828 (n=5)

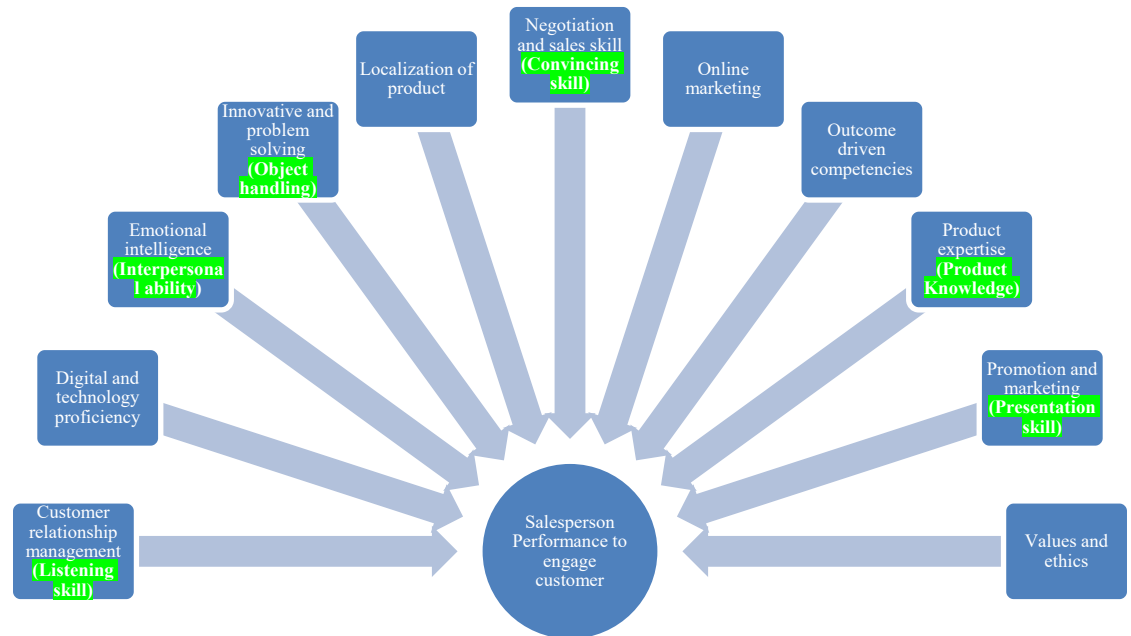
	<p>Resolves your problem calmly and quickly.</p> <p>We hand products to you in person every time.</p> <p>Delivers compelling sales presentations whenever you need a product.</p>	
Problem-solving skills	<p>Is creative in finding solutions.</p> <p>Is detail-oriented.</p> <p>Provide consultation for the entire project across various departments.</p> <p>It is compassionate to your situation.</p> <p>It helps you purchase additional products that you may need for the project.</p> <p>Solves problems in challenging situations</p>	.840 (n=6)
Emotional intelligence	<p>Creates a positive shopping environment for you.</p> <p>Keeps you informed with new products and services.</p> <p>Manages emotion under stress.</p> <p>Has testimonials, and positive reviews from satisfied customers online</p>	.835 (n=4)
Efficiency	<p>Is motivated to help.</p> <p>Uses digital tools and platforms efficiently.</p> <p>Manages time effectively.</p> <p>Shows interest to you by asking legitimate questions</p>	.792 (n=4)
Digital proficiency	<p>Assists with AR/VR tools for product explorations.</p> <p>Educates with online platforms and cybersecurity.</p> <p>Understands and explain ethical implication of product</p>	.820 (n=3)
Industry awareness	<p>Personalize products based on your needs.</p> <p>Stay updated with industry trends to support your needs.</p> <p>Makes recommendations from another department</p>	.779 (n=3)
Customer relationship management	<p>Builds and maintains strong professional relationships.</p>	.736 (n=3)

	<p>Share experience and standard connection to initiate discussion.</p> <p>Prioritizes your satisfaction.</p> <p>Is attentive with corresponding body language (eye contact and positive professional outlook)</p>	
Cultural competence	<p>Respect diversity and cultural nuances.</p> <p>Asks for your positive feedback online</p>	.693 (n=2)

The findings align the conceptual framework developed by Punwatkarn and Varghese (2014) and, compared with current findings, additional competencies needed to be for a holistic list of competencies required by salespeople to successfully engage customers in the store. Figure 4-10 explains the comparison between the current findings and previous similar conceptual structures for better understanding. The findings align with the 6 elements from the conceptual framework, with 5 additional elements added to the framework for more comprehensive list of competencies for salesperson.

Figure 4-10

Findings compared to the conceptual model by Punwatkar & Varghese (2014)



Chapter 5 Discussion

Introduction

The competency-based approach to talent development is increasingly recognized for its potential to nurture and enhance human skills throughout adulthood. This methodology, seen as a modern and forward-thinking strategy for employee development, has gained considerable momentum over the past three decades, particularly in the last 15 years. This period has been marked by significant advancements in understanding and developing competencies, driven by extensive research in various fields. These studies, spanning psychotherapy (Hubble et al., 1999), self-help (Kanfer & Goldstein, 1991), cognitive behavior therapy (Barlow, 1988), training programs (Morrow et al., 1997; Arneson et al., 2013), workplace learning competencies (Rothwell, 2002), and education (Pascarella & Terenzini, 1991), collectively validate the idea that individuals can modify their behaviors, emotions, and self-perceptions. Such findings underscore the dynamic, adaptable nature of human competencies and their potential for lifelong growth and development (Boyatzis, 2008). The result of competencies analysis can be utilized in many ways; according to McLagan (1980) and Spencer and Spencer (1993), the competency inventory can be used for the following:

- Recruitment and selection
- Assessment
- Individual training and development

- Curriculum designing
- Career planning
- Coaching, counseling, mentoring
- Succession planning and high-potential identification
- Career pathing

In retail, with approximately four million salespeople influencing a trillion-dollar industry, it becomes imperative to re-evaluate and enhance the perceived value of salespersons. The retail salesforce can be reimagined through “competency-based pay” or “competency-based workforce planning.” The home improvement industry can utilize a competency-based Human Resource Management system designed by Rothwell and Lindholm (1999) or a competency-based in-house training program developed by Rothwell et al. (2002), which will substantially help retail salespersons to upskill, reskill, and earn more by staying relevant. While focusing on the home improvement sector, this research underscores the broader impact that salespersons can have through diverse competencies. The competency inventory developed through this study holds significant promise for increasing salespeople's efficiency in customer engagement. This section will delve deeper into the future applications of these competencies, exploring how they can be transformed into practical, impactful tools in the retail industry.

My interest in retail salesperson competencies stems from my experience in retail management, which ignited my passion for organizational and human resource development. Since I have trained and developed team members, I have seen multiple generations interconnected and functioning as a team to support customers; at the same

time, individually, they struggle due to fast changes in everyday processes. I have learned that effective change interventions in this field should adopt a bottom-up approach, prioritizing salespersons' perspectives for successful implementation. Concurrently, this research aims to enhance customer engagement by exploring salespersons' competencies that are valuable now and for the future, making it essential to incorporate customers' viewpoints. As a pragmatic researcher, utilizing multiple sources has enabled me to tackle real-world problems and uncover practical solutions. My findings contribute significantly to retail competencies, highlighting current and future competencies necessary for engaging customers. These insights pave the way for developing targeted training platforms, equipping salespersons in home improvement retail to enhance customer engagement and, subsequently, adding value to their organizations.

Limitations and Delimitations

This research has some limitations beyond the enormous opportunities to utilize. The data could be collected through meaningful dialogue between the researchers and expert practitioners, whereas to approach a broader audience within a limited time and to conduct multiple iterations, the instrument was sent through an online written survey program. The Electronic Delphi system is often criticized due to the minimum connection between the researcher and participant and the inability to ask follow-up questions for clarity. Even though the number of participants is limited, the identified information will be generalizable in broader circumstances, but further analysis will be required based on

demographics and how each demographic preference differs from the others. Experts were selected based on pre-determined criteria; additional interviews or questions related to their expertise would be helpful for robust information.

The research findings have laid the foundation for future studies and the development of employment methods to address the future issues of home improvement shops. The dynamic character of competencies was explored through multiple round processes. Increasing the number of data points in the third iteration would help create a standard distribution curve, allowing researchers to extract more statistically significant insights and establish correlation from the survey data. Inexperienced implementation of a Delphi study can lead to superficial and ambiguous findings since the Delphi method was originally intended for expert participants to exchange information (Row & Wright, 1999). This is why multiple experts were involved throughout the process to ensure the research was carried out effectively. A comprehensive comprehension is necessary, which I can guarantee through extensive work experience in the retail industry and thorough investigation to obtain a precise estimation of representations. The Delphi study is a laborious and multi-phased process that is prone to high rates of participant attrition. Previous results indicate the presence of the Bandwagon effect, wherein participants tend to conform to the majority's perspective (Barrett & Heale, 2020).

It is important to acknowledge the limitations of the Delphi study, such as the researcher's preconceived notions about the problem (Linstone & Turoff, 2002). As a qualitative researcher, I utilized the hermeneutic methodology of phenomenology in the initial stage of the Delphi method to set aside any preconceived notions and approach the

subject with an unbiased perspective. The questionnaire is organized to incorporate tiered evaluation from cohorts, advisers, and reviewers, ensuring systematic communication and obtaining opinions with a certain level of anonymity (Linston & Turoff, 2002). This approach helped the research avoid the methodological problem associated with the Delphi study. Linston and Turoff (2002) identified several psychological challenges associated with the Delphi committee process, such as dominant personalities, lack of willingness to participate, power conflicts with higher authorities, and fear of uncertainty. However, these issues can be mitigated by restricting the number of participants to approximately ten, providing ample time for issue consideration, and ensuring confidentiality. Conducting individual interviews can further refine the concerns; although this process is time-consuming, it enhances credibility.

In addition, doing case studies on certain industries might yield more significant findings and contribute to the development of a competency model for the business. On the other hand, using the Delphi approach only resulted in an inventory of competencies for retail salespeople, with limited exploratory findings.

Future Recommendation

Recommendation for practice

The research conducted offers a foundation for future studies and practical strategies to address the evolving challenges in home improvement retail. Given the rapid development of AI and automation, a significant transformation in job roles and

dynamics between employees and employers in the retail sector is expected. The study focuses on retail, which is defined as the sale of goods to the public with value-added customer service (Hortacsu & Syverson, 2015). The retail industry's substantial contribution to the US economy and its significant workforce underscores the urgency of addressing the impending changes.

The development of artificial intelligence (AI) and automation has increased the likelihood that more job profiles within enterprises will be replaced by robots that are enabled by AI. According to a Forbes article, artificial intelligence will replace more than forty percent of blue-collar and white-collar jobs within the next twenty-five to thirty years. Forty-seven percent of the potential for automation will have an effect on retail salespeople (Koetsier, 2019; Muro et al., 2019). This will result in a shift in the dynamics of the relationships that exist between employees of the future and their employers in the retail sector. This is the third major issue that is expected to disrupt employment in the retail sector. At the same time, the impact of AI is often over-specified, and its basic performance still needs to improve. Working with customers more deeply requires cognitive and emotional intelligence, and a successful salesperson will be difficult to replace with AI.

This research was particularly focused on the competencies necessary for customer engagement that a salesperson can acquire to create a unique value advantage for their respective organization. Considering the limitations of automation and artificial intelligence, direct customer engagement is still an area where a salesperson will be necessary. It's important to understand their capacity, capability, and competencies to be

successful in their role to engage customers in the store, besides other repetitive tasks they do in their daily jobs. Competencies can be further analyzed to understand the cross-cultural impact on different competencies and how these unique knowledge, skills, attitudes, and behaviors shift through different environments.

In accordance with the North American Classification System (NAICS), the term "retail" refers to the transaction in which an organization engages in the sale of user-ready items to the public and adds value by providing additional customer service that is incidental to the sale (Hortacsu & Syverson, 2015). According to the National Retail Foundation (2019), retail has a direct impact on 11.65% of the national economy of the United States, contributing 3.9 trillion dollars to the national GDP and providing employment for 52 million people (about twice the population of Texas) simultaneously. The borrow-and-tailor approach for competency modeling is not going to work for the retail industry since it is a rapidly changing environment with many different factors that influence customer engagement and salesperson jobs. A simple question I always ask is, how many more products would you buy every grocery store visit if a salesperson came and helped you? Now, the ROI and profit margin from the service are still a part of the debate, but the value a salesperson can add is confirmed, and plenty of areas to explore.

This transition is accompanied by a positive outlook for online venues and a decreased reliance on brick-and-mortar establishments. The shakeout of department stores is a good example of the tremendous transition that has taken place in retail environments. According to Frey and Osborne (2017), it is estimated that automation would replace retail salespeople with a likelihood of 92% based on the features of their

tasks, and the upskilling and reskilling of retail salespeople is needed where this competency inventory can make headspace for researchers.

As stated by Jacoby (2015), the issue is not solely the presence of automation; rather, it is the reality that a significant number of newly created employees demand specialized skills that are in short supply. Today, we are going through skill shifts due to increased digitization, placing data literacy and analytics high on the priority list for many employers (Illanes et al., 2018). A large amount of reskilling, upskilling, and improvement in the information technology abilities of retail personnel is required. According to the United States Bureau of Labor Statistics (2021), the retail salesperson (SOC: 41-2031) position will have one of the biggest reductions in employment, with approximately 40,000 jobs being lost annually through the year 2030. This fact alone demonstrates a compelling incentive for employees to acquire new skills. In addition, taking into consideration that the typical wage in the retail industry is \$27,080, the impact of upskilling can be astonishing for the four million retail salespeople. Understanding an organization's mission and vision is crucial not only for wages and employee engagement, but also because 75% of employees place their trust in their organization to act responsibly. They expect not to be let down by the organization's approach to sustainability and employment practices (Sadique, 2024). Implementing competency-based wages and payroll, along with equipping retail salespersons through reskilling and upskilling, can significantly enhance the lives of many salespersons.

Retail salespersons can stay within the occupation and grow through reskilling and upskilling, focusing on customer engagement, which will add value to the business.

Businesses also need to maintain a huge workforce and their business presence either voluntarily or involuntarily. The research-based approach seeks a lifelong learning tactic that allows not only experienced workers to have easy access to upskilling and reskilling in the stages of careers but also enables inexperienced and less experienced workers to have a personalized transformative coach that adapts their recommendations over time while proactively identifying and recommending necessary interventions and keep them hopeful about their career through the transition (Yoon et al., 2021). As AI and automation become more commonplace as the natural next step for many large organizations, in 2020 alone, up to 42% of skills could be displaced, and a projected 400 million workers will require strategic upskilling to new occupations by 2030 (McKinsey, 2017).

Instead of advocating for the replacement of the workforce by AI, this research focuses on utilizing AI as a tool to predict future work demands for retail salespersons accurately. This information can then be used to plan for training and development effectively, a standard practice in the sector today. The competencies inventory can be used for general workforce planning. After identifying observable and quantifiable criteria for a given business through data-gathering activities, an assessment will be conducted to determine retail salespersons' present level of knowledge, skills, and abilities (KSAs). This assessment aims to discover any gaps in their skills. This notion will thereafter be used to enhance and retrain individuals' skills. Expanding on this idea, the objective should be to develop a cutting-edge structure and a collection of artificial intelligence tools that can assist in achieving the following goals: (1) preparing retail

salespersons for future sales work by effectively engaging customers in the store, (2) improving the ability of salespersons to navigate and enhance their skills in attracting and engaging people, and (3) aiding retail organizations in supporting their current employees as they adapt to future sales work and potential career changes.

The salesperson competency inventory will assist retail salespersons and retail businesses in adapting to the swift advancements in future technology, jobs, and workforce. Envision the implementation of this technology as a smartphone application that is easily accessible to ordinary consumers. It can also advise ways to improve skills and acquire new ones, as well as make recommendations for transitioning to different careers based on the user's background, personal preferences, and industry trends; some industry has different pay grades than others, and the home improvement industry is usually the highest paying industry in the retail category. Simultaneously, employers will get a distinct understanding of the preparedness of the existing personnel for forthcoming requirements and be enlightened on how to maintain their involvement in their professions and developing endeavors. This will additionally facilitate the implementation of transformation coaching, which aims to foster a culture of ongoing learning, enhance employee involvement, nurture adaptability, and enhance overall performance and productivity (Sadique, 2024).

Additional evidence of KSAT may be required to better understand the behavioral indicators and utilize the information for retail salesperson training and development. The competencies can be further differentiated between average and exemplary performers, and each behavioral indicator can be utilized to create a measurement system of retail

workforce competencies. A chart can be used to effectively utilize the skills and categorize them. This can lead to opportunities for training and development, cognitive growth, and organizational change management initiatives, as depicted in Table 5-1. Categorizing them can assist organizations in making short-term adjustments and implementing long-term treatments through coaching and cultural changes. These competencies can be based on individual organizations, using the core competencies developed through this research and further adapted based on unique need and situation of the organization.

Table 5-1

Conceptual Breakdown of Competencies into Categories

Knowledge	Skills	Attitudes	Other Tools
-Product details -Industry trend	-Presentation skills -Negotiation skills	-Greeting with a smile -Commitment to customer service	-CRM software -Devices to see online information

Exploring capabilities and equipping the workforce for optimal performance can be effectively achieved through competency-based training and development in the retail industry (Rothwell et al., 2002). Rothwell et al. established a model that categorizes competencies into three areas: self-knowledge, product and service knowledge, and client and business knowledge. A training and development program can be designed based on these categories to support the salesperson in the home improvement organization

targeting customer engagement. Future research recommendations for home improvement retail salespersons to improve customer engagement could focus on:

- Investigating the efficacy of competency-based HR systems in bridging the gap between the demand for top-tier sales performance and the availability of such skilled individuals.
- Exploring the impact of competency-based compensation on the motivation and skill enhancement of retail salespersons, including the benefits of reskilling and upskilling initiatives.
- Evaluating the use of competency-based approaches for coaching and transformative organizational change, specifically tailored to the retail environment.
- Developing and testing a robust training program aimed at home improvement retail staff that incorporates behavioral indicators to create measurable and observable tools for assessing performance and customer engagement outcomes.

Recommendation for Researchers

Competency modeling needs to continue for retail salespeople, particularly salespersons directly working on the sales floor with the customers. Human interaction and the impact of human interaction in retail contain value, which needs to be further explored to develop a clear understanding. Even to support AI development, these

competency studies will be beneficial in the long run. Each competency can further be explored to understand where exemplary performers excel in their respective organizations, and any moderating or mediating variables, which can make an impact on their work outcome as a salesperson. There are different demographic variables that can be categorized and compared, for example gender, age, experience, size of team might have an impact on their performance to engage customers in the store.

The new conceptual development of competencies and capabilities brings a new dimension to competency research, where the competencies required for the future are understood as capabilities. This research contributes to the expected change in retail competencies, but further capability study can be the next step. There are a few different approaches that are appropriate, and researchers strongly recommend utilizing the DACUM method for competency analysis. Rothwell and Lindholm (1999) suggested utilizing behavioral event interview (BEI) and critical incident technique (CIT) with exemplary and average performers to develop competency, which could benefit the findings of this study. The competencies identified also need further investigation to develop measurable and observable behaviors of the successful salesperson, and the salesperson who is highly successful should address the competencies for the organization. Also, every observable and measurable behavior, attitude, knowledge, and skill can be identified for retail salespersons which in terms will help to facilitate any training or education session for retailers. I also recommend comparative studies between retail and other industries undergoing similar technological transformations to identify best practices and potential pitfalls in managing workforce changes. As marked as the

most important competency, I urge research into the ethical considerations and policy implications of increased automation in retail, focusing on employee welfare, consumer rights, and broader societal impacts.

This research can be further tied in into in-depth research into evolving consumer behaviors, particularly how they interact with both online and offline retail channels. This could help in understanding the nuanced needs and expectations of modern consumers. Considering the research topic, I can envision a longitudinal study to track the efficacy of reskilling and upskilling programs in retail. This could provide valuable insights into the long-term impacts of such initiatives on employee adaptation and career progression.

Conclusion

In conclusion, the future of retail salespersons hinges on a diverse set of competencies that encompass both traditional skills and emerging demands in the USA's home improvement industry. Advanced Customer Relationship Management, emphasizing active listening and empathy, is crucial for creating positive shopping experiences and meeting individual customer needs. Communication Skills, such as engaging presentations and storytelling, are vital for effective customer interactions. Emotional Intelligence and Interpersonal Skills are pivotal in adapting to various customer personalities and managing high-pressure situations. Innovation and Problem-Solving, along with Sales and Marketing Acumen, are essential for addressing customer issues and staying abreast. Competencies collectively paint a picture of a dynamic,

adaptable, and customer-centric sales force poised to meet the challenges and opportunities of the future retail landscape.

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Appendix A

Data Collection Tool Iteration 1

Salesperson competencies

Start of Block: Informed Consent

Q1

Welcome to the research study!

We are conducting a study aimed at gaining a comprehensive understanding of the knowledge, skills, attitudes, and qualities necessary for a salesperson to improve customer interaction within the home improvement retail industry. Our goal is to explore what skillset still enable salespersons to effectively carry out their duties, especially with respect to customer engagement within the retail environment. We aim to use this information to better prepare for the imminent future of the retail sector.

For this study, you have been invited due to your work experience and expertise as a retail salesperson/manager. You will be asked to answer some questions about the retail salesperson's knowledge, skill, attitude and abilities on the first round, and we will follow up with the result for your final thoughts. Your participation in this research is voluntary, and you will not be penalized or lose benefits if you refuse to participate or decide to

stop. Your responses will be kept completely confidential.

The study should take you around 15 minutes or less. The Principal Investigator of this study can be contacted at Farhan Sadique, can be reached at +1 316 640 7001. You may contact the Human Research Protection Program at 814-865-1775 if you have questions about your rights as a research subject or what to do if you are injured.

By clicking the button below, you acknowledge:

Your participation in the study is voluntary. You are 18 years of age. You are an experienced salesperson or worked as retail manager in the home improvement industry in the USA. You are aware that you may choose to terminate your participation at any time for any reason.

- ☐ I consent, begin the study (1)
- ☐ I do not consent, I do not wish to participate (2)

End of Block: Informed Consent

Start of Block: Block 2

Q0 We'd love to express our gratitude and get your feedback on the results of our study! Please leave your email address.

Q1 Describe an instance where you witnessed a salesperson effectively engaging with customers and building a strong relationship with customer.

Q2 In that specific event, what did the salesperson do exceptionally to establish a connection with the customers?

Q3 What abilities or traits are needed for a salesperson to be successful in their profession?

Q5 What techniques does a salesperson utilize to develop a connection with customers (if any)?

End of Block: Block 2

Start of Block: Block 3

Q6 Considering recent changes in the retail industry, what new responsibilities do you believe salespeople now have compared to the past?

Q7 What personal and work skills do you think will be important for getting along well with customers in the future?

Q8 What abilities or traits will you want to see further improved for better engaging customers in your store?

Q9 Do you have any additional comments, concerns, or suggestions regarding the competencies of salespersons to increase customer engagement?

End of Block: Block 3

Start of Block: Block 1

Q10 What's the size of the team you lead?

- ☐ 0 (1)
- ☐ 1-5 (2)
- ☐ 6-10 (3)
- ☐ 11-16 (4)
- ☐ More than 16 (5)

Q11 How many years have you been in this position?

- ☐ Less than 3 years (4)
 - ☐ 4-10 years (5)
 - ☐ More than 10 years (6)
-

Q12 How do you describe yourself?

- ☐ Male (1)
 - ☐ Female (2)
 - ☐ Non-binary / third gender (3)
 - ☐ Prefer to self-describe (4)
-

- ☐ Prefer not to say (5)
-

Q13 Choose one or more races that you consider yourself to be

- ☐ White or Caucasian (1)
- ☐ Black or African American (2)
- ☐ American Indian/Native American or Alaska Native (3)
- ☐ Asian (4)
- ☐ Native Hawaiian or Other Pacific Islander (5)
- ☐ Other (6)
- ☐ Prefer not to say (7)

Appendix B

Data Collection Tool Iteration 2

Delphi Round 2

Start of Block: Default Question Block

Q1 Welcome to Part 2 of our research study, which can be completed in just 2-3 minutes with only 5 clicks.

We want to express our gratitude to all those who participated in Round 1. We received an overwhelming response from 84 expert retailers in the USA. We are now in the final phase of refining the list of essential skills and knowledge required for success in engaging customers within the home improvement retail industry. This survey is designed to verify the accumulated results and provide participants with an opportunity to accept, add, edit, or remove any knowledge, skills, abilities, attitude, or behavior from the list.

Should you have any inquiries or need to contact the principal investigator of this study, please feel free to reach out to Farhan Sadique at +1 316 640 7001.

Additionally, if you have any questions regarding your rights as a research subject or

what to do in case of injury, you can contact the Human Research Protection Program at 814-865-1775.

By clicking the button below, you confirm the following:

Your participation in the study is entirely voluntary.

You are at least 18 years of age.

You have experience as a salesperson or have worked as a retail manager in the home improvement industry in the USA.

You understand that you have the option to discontinue your participation at any time, for any reason.

☐ I consent, begin the study (1)

☐ I do not consent, I do not wish to participate (2)

Page

Break

Q2 We'd love to express our gratitude and get your feedback on the results of our study! Please leave your email address.

Q3 What knowledge, skills, attitude, behavior, abilities impact customer engagement in home improvement retail stores? Part 1: **Category: Behavioral competencies**

1. Achieve goals independently, 2. Active listening to customer's needs, consent, and preferences, 3. Attention to detail, 4. Be authentic and ethical, 5. Be available for customers, 6. Be friendly, 7. Be patient with customers, 8. Be personable, 9. Be sincere, 10. Be transparent, 11. Be trustworthy, 12. Creativity in finding solutions, 13. Desire to be competitive, 14. Effective time management 15. Leading by setting examples, 16. Perseverance and determination, 17. Prioritizing tasks, 18. Setting clear and achievable goals

Category: Product knowledge and presentation skill

1. Arrange product release events to promote products, 2. Suggesting products based on customer preferences, 3. Confidence in the product being sold, 4. Explaining product information effectively, 5. Keeping customers informed of new products and services, 6.

Personalizing product presentations to showcase benefits, 7. Product presentation skills in virtual environments, 8. Staying updated with industry trends.

Category: Customer relationship management

1. Create customer community, 2. Develop long term relationship with customer, 3. Developing professional network, 4. Earning trust and developing relationship, 5. Educating customers, 6. Exceed expectation by going above and beyond, 7. Express gratitude for customers time and business, 8. Follow up after sales via phone or future visit, 9. Greeting customers by name, 10. Incentive for customer referrals

- ☐ Accept (1)
- ☐ Remove (2) _____
- ☐ Add (3) _____
- ☐ Edit (4) _____

Q4 What knowledge, skills, attitude, behavior, abilities impact customer engagement in home improvement retail stores? Part 2: **Category: Customer centric competencies**

1. Adjust strategies based on customer's personality, 2. Appreciate customers for loyalty, 3. Connect with customer's children and visitors, 4. Create interactive contents to initiate conversation and stay engaged, 5. Deliver compelling and engaging sales presentation, 6.

Ensure inventory is accurate to match with online, 7. Explore new methods and techniques in sales, 8. Find a common connection through sharing experience, 9. Focusing on human interaction as an actual person or ability to develop relationship with customers, 10. Hand delivery the products to customer, 11. Identify opportunities for additional sales, 12. Make professional and engaging calls, 13. Personalized product selection, 14. Prioritizing customer satisfaction, 15. Provide efficient service using less manpower, 16. Provide instant service online, 17. Remembering conversation for future references, 18. Send targeted and personalized text message, 19. Strong greeting and maintain meaningful contract, 20. Take ownership of the project to satisfy customers, 21. Understand customer's perspective, intended use, specifications, and budget.

Category: Local Customer relationship management

1. Adjust price based on market 2. Ask satisfied customer to refer 3. Connect with customers at events 4. Develop network through events 5. Engaging with local communities 6. Offer special discount for potential clients 7. Personalized communication 8. Showcase testimonials, review, rating 9. Using mobile apps to connect with customers 10. Using social pages to connect 11. Offer Loyalty program for future business 12. Send personalized notes or gifts to customers 13. Stay engaged with the customers and community 14. Use CRM software's effectively to manage customer relationship.

Category: Effective interpersonal skill for customer communication

1. Actively listen to customer's need 2. Be accessible through various communication channel 3. Communicate through sharing stories of other customers 4. Communicating in multiple language 5. Compassion to customer's situation 6. Effectively influencing customers 7. Listening to customers 8. Maintaining eye contact 9. Maintaining professionalism in interaction 10. Nonjudgmental 11. Proactive, confident, charismatic, sympathetic 12. Respecting diversity and culture 13. Resiliency 14. Self-motivated

Category: Emotional intelligence for customer safety and communication

1. Aware of customer's personal safety and convenience 2. Conflict resolution in more challenging space 3. Emotional intelligence for conflict resolution 4. Encourage feedback from customers to share opinions and concerns 5. Ensuring cybersecurity 6. Understanding and communicating ethical implication of products and eco-friendly product

- ☐ Accept (1)
- ☐ Remove (2) _____
- ☐ Add (3) _____
- ☐ Edit (4) _____

Q5 What knowledge, skills, attitude, behavior, abilities impact customer engagement in home improvement retail stores? Part 3: **Category: Innovative and**

Problem-solving competencies

1. Collaborating with remote teams and support system 2. Compete with online stores such as Amazon 3. Conduct surveys to gather insight 4. Handle rejection and setbacks 5. Identify solution by thinking outside the box 6. Maintaining positive outlook 7. Make planned multiple attempts to help customer 8. Managing emotion under stress 9. Managing subscription services 10. Managing the whole system 11. Negotiating skills to close deals effectively 12. Resolve customer's problem calmly and quickly 13. Ask who, why, and what questions 14. Conduct survey 15. Show interest and care by asking legitimate questions 16. Solve customer's problem with a smile 17. Solve routine and complex problems of customer 18. Take responsibility for outcomes 19. Willing to take risk for rewards

Category: Online marketing and influencing skill

1. Actively Build online customer communities 2. Analyse online reviews and consider feedback for improvement 3. Build relationship through social media by sharing insights and engaging conversation 4. Collaborate with influencers for product endorsement 5. Conduct virtual meeting to stay connected 6. Creating online contents on various platform to increase visibility and engagement 7. Connect through LinkedIn to maintain connection 8. Connect with customers through social app to maintain connection outside 9. Connecting through online website to maintain connection 10. Hold podcast to connect with audience to create new connection 11. Hosting trade shows, product launch to engage to increase network 12. Networking through events 13. Online forum

communication 14. Personalized communication through text 15. Real time support 16. Manage and enhance online reputation through positive interaction 17. Optimize product listing and visibility on online marketplace 18. Promote service and program of the company to increase sales 19. Promote warranty and credit card programs to increase bottom line 20. Providing real time assistance in virtual platform 21. Selling products on social media 22. Share contents through blogs, videos, and podcast 23. Stay informed with internet and social media to deal with informed clients 24. Write online blogs to reach wider audience

Category: Technology and digital proficiency

1. Assist customer with AR and VR tools for product exploration 2. Assist customers with mobile app features, voice activated device 3. Educating customers about online platforms 4. Proficiency using digital tool and platforms 5. Promoting the use of tech in shopping 6. Quickly adapt new technology and platforms 7. Seamless integration of online and offline shopping experience 8. Use AI algorithms to recommend products 9. Utilizing customer relationship Management Software

- ☐ Accept (1)
 - ☐ Remove (2) _____
 - ☐ Add (3) _____
 - ☐ Edit (4) _____
-

Q6 What knowledge, skills, attitudes, behavior, and abilities are anticipated to have an impact on the Future of home improvement retail stores? Part 1: **Category:**

Emotional intelligence for problem-solving

1. Resolve customer complaints effectively 2. Analytical tool optimization for sales strategies 3. Develop strategies to face challenging customer behavior 4. Efficiently prioritizing tasks 5. Finding quick and effective solutions for customer issues 6. Predict customer needs and market trends 7. Reach agreement and comprise 8. Remain calm, and composed, and use reasonable judgment in challenging situations 9. Think new ways to satisfy unique customer requirements 10. Understanding customer behavior and decision-making process 11. Adjust to different personalities and situations

Category: Technology and digital proficiency

1. Effectively using social media 2. Learn and guide customers in online selling platforms for shopping and reservation 3. Maintaining online positive reviews 4. Proficiency in using digital platforms for communication 5. Technical assistant to solve digital issues 6. Use Digital tools and platforms for communication Values and ethics to help customers 1. Be truthful and transparent in all interactions 2. Cultural understanding 3. Multilingual skills 4. Respect to diversity and culture 5. Understand and communicate safety protocols 6. Understand return and exchange policies 7. Understanding eco-friendly products to meet customer demand

Categories: Effective interpersonal skills for customer communication

1. Manage time effectively 2. Open to feedback and act upon 3. Patience and professionalism in behavior 4. Pursue goals and overcome obstacles 5. Team collaboration through shared vision 6. Understanding customer emotion 7. Understanding the importance of service to compete 8. Willingness to change and learn new skills.

☐ Accept (1)

☐ Remove (2) _____

☐ Add (3) _____

☐ Edit (5) _____

Q7 What knowledge, skills, attitudes, behavior, and abilities are anticipated to have an impact on the Future of home improvement retail stores? Part 2: **Categories:**

Behavioral competencies

1. Active listening, fully concentrating, understanding, responding, and remembering 2. Constructive and optimistic 3. Empathy 4. Managing time effectively 5. Multi-tasking to complete tasks and help customers 6. Passion for retail 7. Patience 8. Polite and respectful 9. Positive attitude Product knowledge, and presentation skills 1. Clearly conveying ideas in an easily understandable manner 2. Cross-selling and upselling skills 3. Deep understanding of the product with detailed information and recommendations 4. Effective use of body language 5. Effectively present product features 6. Engaging and

informative presentation skills 7. Eye contract 8. Help customers to make informed decisions 9. Professional appearance 10. Storytelling that customers can relate to 11. Understanding of technical aspect of the product

Categories: Product knowledge, and presentation skill

1. Clearly conveying ideas in an easily understandable manner 2. Cross-selling and upselling skills 3. Deep understanding of the product with detailed information and recommendations 4. Effective use of body language 5. Effectively present product features 6. Engaging and informative presentation skills 7. Eye contract 8. Help customers to make informed decisions 9. Professional appearance 10. Storytelling that customers can relate to 11. Understanding of technical aspect of the product

Categories: Customer-centric competencies

1. Always focus on customer and communication 2. Be adaptable to different ages and behaviors 3. Be more efficient with a smaller number of employees 4. Be personable interact warmly and meaningfully with customers 5. Building and maintaining professional relationships 6. Confident and convincing in speaking 7. Craft a compelling narrative to connect with customers 8. Create a positive environment for shopping 9. Faster follow-up with customers 10. Plan to maintain long-term customer relations 11. Prioritize customer needs and satisfaction 12. Provide proactive and efficient assistance 13. Provide quality experience besides multitasking 14. Remembering information to refer each customer 15. Staying updated on current market trends 16. Visual

Merchandising

Categories: Effective interpersonal skills for customer communication.

1. Manage time effectively 2. Open to feedback and act upon 3. Patience and professionalism in behavior 4. Pursue goals and overcome obstacles 5. Team collaboration through shared vision 6. Understanding customer emotion 7. Understanding the importance of service to compete 8. Willingness to change and learn new skills.

Categories: Customer-centric competencies

1. Always focus on customer and communication 2. Be adaptable to different ages and behaviors 3. Be more efficient with a smaller number of employees 4. Be personable interact warmly and meaningfully with customers 5. Building and maintaining professional relationships 6. Confident and convincing in speaking 7. Craft a compelling narrative to connect with customers 8. Create a positive environment for shopping 9. Faster follow-up with customers 10. Plan to maintain long-term customer relations 11. Prioritize customer needs and satisfaction 12. Provide proactive and efficient assistance 13. Provide quality experience besides multitasking 14. Remembering information to refer each customer 15. Staying updated on current market trends 16. Visual

Merchandising

- ☐ Accept (1)
- ☐ Remove (2) _____
- ☐ Add (3) _____
- ☐ Edit (4) _____

End of Block: Default Question Block

Appendix C Data Collection Tool Iteration 3

Competencies of Salesperson

Start of Block: Block 1

Q1.1 Welcome to our research initiative! We are researching the essential competencies salespeople need to engage customers in the home improvement retail industry. Drawing on the expertise of 80 seasoned sales professionals, we have identified a set of key competencies. It is believed that these competencies increase the frequency and satisfaction of customers and maintain engagement. You are a valued customer, and your opinion is very important. We invite you to tell us which skills you think are most important for a great shopping experience. Focusing on your experience when shopping in home improvement stores, what is important to engage you as a customer?

Your Role as a Participant:

If you are a regular patron of home improvement stores in the USA, we invite you to share your perspectives. Your feedback will focus on the importance of various knowledge, skills, attitudes, abilities, and behaviors of retail salespersons that you believe are crucial for an exceptional shopping experience.

Voluntary Participation and Confidentiality:

Please note that your participation in this study is completely voluntary. There is no penalty or loss of benefits for choosing not to participate or for withdrawing from the study at any stage. Rest assured, all your responses will be kept confidential.

Time Commitment:

The survey should take approximately **5–7 minutes** to complete.

Contact Information:

For any queries, feel free to reach out to the principal investigator at fvs5201@psu.edu or call +1 316 640

By proceeding, you acknowledge the following:

- Your participation is entirely voluntary. You understand that you may withdraw from the study at any time, for any reason.
- You are at least 18 years of age.
- You have experience shopping at home improvement retail stores in the USA.

☐ I consent, begin the study (1)







☐ I do not consent, I do not wish to participate (2)

Start of Block: Preferences

Q2.1 Page 1 of 2

Customer relationship management






Not at all important	Slightly important	Moderately important	Very important	Extremely important	Not Applicable		
		0	1	2	3	4	5

Listens, understands, and responds to your need ()	
Builds and maintains strong professional relationships ()	
Creates a positive shopping environment for you ()	
Follows up after sales ()	
Shows gratitude for your contribution to business ()	
Prioritizes your satisfaction ()	

Q2.2 Digital and technological proficiency











Not at all important Slightly important Moderately important Very important Extremely important Not Applicable

0 1 2 3 4 5

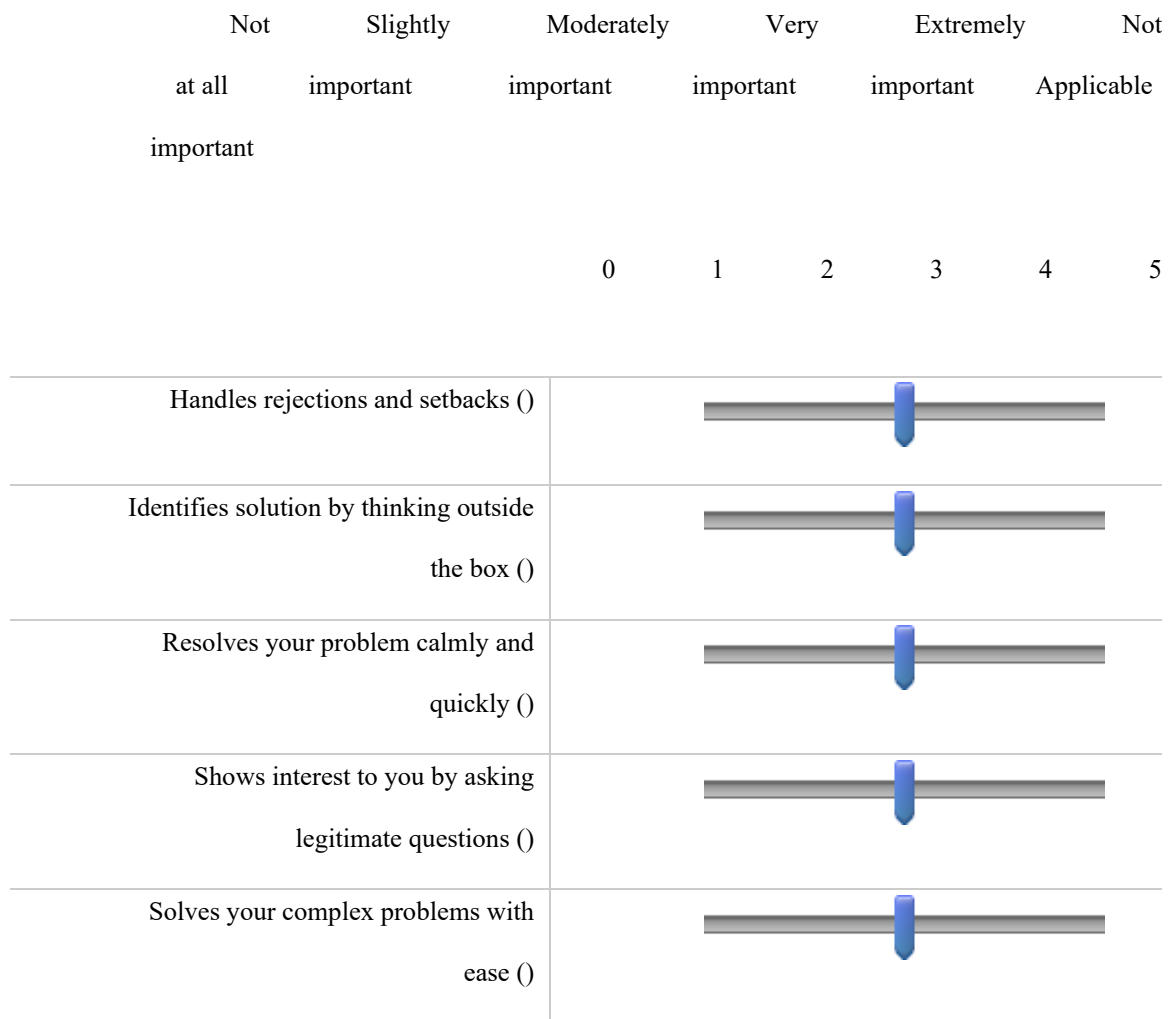
Assists with AR/VR tools for products explorations ()	
Educates with online platform and cybersecurity ()	
Integrates online and offline shopping experience ()	
Uses digital tools and platforms efficiently ()	
Manages relationship effectively using technologies and software ()	

Q2.3 Emotional intelligence (EI)

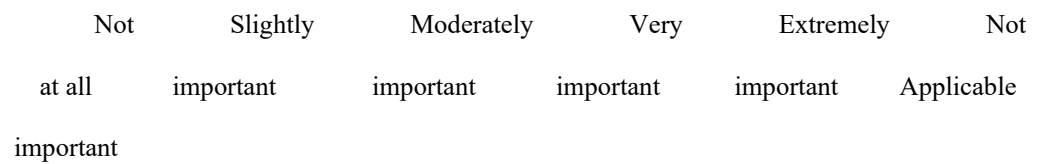
Not at all important	Slightly important	Moderately important	Very important	Extremely important	Not Applicable
0	1	2	3	4	5

s compassionate to your situation ()	
Is attentive with corresponding body language (eye contact and positive professional outlook) ()	
Solves problems in challenging situation ()	
Shares experience and common connection to initiate discussion ()	
Addresses anyone shopping with you, including kids ()	
Creates interactive contents to engage in conversation ()	
Influences you effectively to make decision ()	
Manages emotion under stress ()	
Is non judgmental ()	
Takes responsibilities of outcomes ()	

Q2.4 Innovative and problem-solving skills



Q2.5 Localization of products





Q2.6 Negotiation and sales competencies









Q2.7 Online marketing

Not at all important	Slightly important	Moderately important	Very important	Extremely important	Not Applicable		
		0	1	2	3	4	5

Q2.8 Outcome-driven skills






Not	Slightly	Moderately	Very	Extremely	Not
at all	important	important	important	important	Applicable
important					

0	1	2	3	4	5
---	---	---	---	---	---

Is detail oriented ()	
Is creative in finding solution ()	
Manages time effectively ()	
Provide accurate information about inventory ()	
Provide consultation for entire project across various departments ()	
Is motivated to help ()	





Q2.9 Product expertise

Not at all important	Slightly important	Moderately important	Very important	Extremely important	Not Applicable
0	1	2	3	4	5

Is confident of product knowledge ()	
Explains all aspects of the products ()	
Personalizes products based on your need ()	
Stays updated with industry trend to support your need ()	
Makes recommendations from other department ()	

Q2.10 Promotion and marketing competencies

Not at all important	Slightly important	Moderately important	Very important	Extremely important	Not Applicable
0	1	2	3	4	5

Is authentic, ethical, and transparent in all interactions ()	
Is trustworthy ()	
Respects diversity and cultural nuances ()	
Understands and explains ethical implication of product ()	

End of Block: Preferences

Start of Block: Block 3

Q3.1 Page 2 of 2

Thank you, as a valued customer, your feedback has been incredibly insightful. We have just a few more questions to ask. We are now shifting our focus to the **future of retail sales** in home improvement in the USA. In this section, we examine how the skills of the home improvement sales team may need to change

in the future. Please indicate by rating them from "not at all important" to "extremely important."

The Survey Code is: VS8C-HSCS-54ZR-GFNC

	N ot at all important (16)	Slig htly important (17)	Modera tely important (18)	V ery important (19)	Extrem ely important (20)
Communicates effectively online. (1) (1)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Develops new skills to stay relevant and effective. (2) (2)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Caters to global and diverse customers based on cultural understanding (3) (3)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understands and promotes eco-friendly practices (4) (4)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Understands and manages customer emotions, going beyond just empathy and trust (5) (5)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Emphasizes adaptability in a changing environment. (6) (6)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adopts customer-centric approaches, to gain a deeper understanding and create a positive shopping environment. (7) (7)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Maintains
positive reviews
online on platforms
such as Google and
Yelp for the home
improvement retail
store (8 (8))



Q3.2

If there are any additional competencies you believe should be included for retail salespeople in the home improvement industry, please provide your suggestions below.

Q4.1 How old are you?

- ☐ Under 18 (1)
 - ☐ 18-24 years old (2)
 - ☐ 25-34 years old (3)
 - ☐ 35-44 years old (4)
 - ☐ 45-54 years old (5)
 - ☐ 55-64 years old (6)
 - ☐ 65+ years old (7)
-

Q4.2 How do you describe yourself?

- ☐ Male (1)
 - ☐ Female (2)
 - ☐ Non-binary / third gender (3)
 - ☐ Prefer to self-describe (4) _____
 - ☐ Prefer not to say (5)
-

Q4.3 What is the highest level of education you have completed?

- ☐ Some high school or less (1)
 - ☐ High school diploma or GED (2)
 - ☐ Some college, but no degree (3)
 - ☐ Associates or technical degree (4)
 - ☐ Bachelor's degree (5)
 - ☐ Graduate or professional degree (MA, MS, MBA, PhD, JD, MD, DDS etc.) (6)
 - ☐ Prefer not to say (7)
-

Q4.4 How often do you visit home improvement stores?

- ☐ Never (1)
- ☐ Less than once a month (2)
- ☐ Once a month (3)
- ☐ 2-3 times a month (4)
- ☐ More than 3 times a month (5)

End of Block: Block 3

Appendix D

Rotated Component Matrix

Rotated Component Matrix

[illegible]

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 21 iterations.

VITA: FARHAN SADIQUE

EDUCATION

-The Pennsylvania State University, University Park, PA
Workforce Education and Development, February 2024
Doctor of Philosophy in Human Resource Development and Organization Development
-Pittsburg State University, Pittsburg, KS
Human Resource Development, May 2015
Master of Science in Human Resource Development

WORK EXPERINCE

-Menard Home Improvement, Wichita, KS/Salina, KS
Department Manager, Assistant Department Manager, Manager Trainee, Oct 2015 – Apr 2019
-Rothwell and Associates, Project Manager and Researcher, Aug 2020 – Current
-Graduate Research Assistant , Department of Learning and Performance System
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-Instructor (SRTEs available): Engr 409 (Leadership in Organizations, Online), Engr 409 (Leadership in Organizations, Residential)
Guest Lecturer : WFED501 (Scholarly Writing, Graduate level), WFED 529 (Ethics in Workforce Education, Graduate level)

PUBLICATIONS

-Book/Book Chapters: 1. Rothwell, W. J., F., Zaballero, A. Sadique & Bakhshandeh, B. (2024). Revolutionizing Online Learning: 400+ Ways to Engage Online Learners. Taylor and Francis Group. 2. Rothwell, W. J., Zaballero, A., Sadique, F. (2024). Measuring ROI in Tech-based Learning (Book Chapter). Pearson. 3. Sadique, F. (2024). Using Positive Psychology (Book Chapter). Taylor and Frances. 4. Rothwell, W., & Sadique, F. (2023). Mastering the Art of Process Consultation and Virtual Group Coaching Simulation: Applying the Action Research Model (ARM). 5. Sadique, F. (2024). Marketing the Organization as a Social Change Agent. (Book chapter) 6. Sadique, F. (2023). Transformational coaching methodologies (Book chapter)
-Articles: 1. Brendel, W. T., Samarin, I. A., & Sadique, F. (2021). Open-Source organization development: a platform for creating conscious OD applications. Organization Development Review, 2. Yoon, H. J., Chang, Y.-L., Sadique, F., & Al Balushi, I. (2021). Mechanisms for hopeful employee career development in COVID-19: a hope-action theory perspective. Advances in Developing Human Resources, 3. Imroz, S. M., Sadique, F., & Trambadia, N. (2021). An analysis of air traffic controllers' job satisfaction. Journal of Aviation Education and Research.

CERTIFICATES

Certified Career Service Provider (CCSP-NCDA), Certified Human Resource Professional (SHRM-CP), Organization Development and Change Graduate Certificate in Consulting Skills, Organization Development and Change Essentials Graduate Certificate

AWARDS/RECOGNITION

Dr. Kenneth E. Ruch Award in Education, Best Customer Service Award 2017, Outstanding Officer 2021, Graduate Student Recognition Awards 2023, Emerging Organization Development Practitioner Award 2023, Student Leader Scholarship 2020, 2021, Kinley-Schumacher Scholarship 2021-2024, J T Impellitteri Scholarship 2021-2024

FUNDED PROJECTS

Evaluating implementation of and farmers' participation in conservation programs (Amount \$14,922; 8/01/2020- 12/21/2022); PlainSect community water development project (Amount \$49,925; 04/01/2019- 12/21/2022); Evaluation capacity building extension educators (Amount \$50,000; 04/01/2019-6/01/2023)
