

Assessment of the competence development level of personal agents in the context of relationship marketing

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Abstract. The paper represents novelty and features of the authors' understanding of relationship marketing. It is scientific and practically new paradigm in science. The paper outlines the purpose of relationship marketing – to build, maintain and develop privileged relationships with the company's stakeholders in order to obtain mutual benefits and help to society. The authors focus on definition of personal sales and personal sales' target. The paper describes behavioral indicators characterizing demonstration of competences included in the "Influencing" cluster and proposes stages of assessment of the competence development level of personal agents. The paper reveals the authors' questionnaire to assess the competence development level of personal agents. The authors propose three formulas for assessment of the individual competence development level.

Key words: relationship marketing, personal sales, competence development level, personal agents

1 Introduction

In modern conditions, companies must solve important problems. They face such problems as high competition in the markets for goods and services, decrease in the effectiveness of traditional personal sales, changing needs, and an increase in the importance of satisfaction level, involvement and trust from customers. The company's solution is related to the

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management of personal sales, the effectiveness of which is expressed in building, maintaining and developing privileged relationships with customers.

Today relationship marketing has become a sought-after concept in the world, and smart companies are actively using their corresponding strategies. However, applying the concept of relationship marketing in practice requires new tools for translating marketing strategies, one of which is personal sales. We note that methodological approaches to managing personal sales require improvement due to a change in marketing paradigms. We can achieve a positive effect using effective tools adapted to the relationship-marketing environment. One tool is a competence model. The role of the human factor in the development of economic processes is growing. One of the main factors for making a profit is a sale staff. The culture of trade is changing, and with it, the functions of sales staff are changing too. These circumstances require the regulation of the education of employees with a significant set of the competences. This primarily concerns people who are engaged in personal sales – personal agents. Only in this case, personal sales will be effective. We should note that the presented competence model is necessary to manage personal sales to increase the main indicators characterizing the effectiveness of personal sales. Thus, two parties receive valuable benefits - the company and the customers. Creating a competence model is not enough. It is important to have a set of tools to assess the competence development level of personal agents. The purpose of the article is to develop stages of assessment of the competence development level of personal agents in the context of relationship marketing. To achieve the goal, you need to solve several problems. First, we should define the relationship marketing and indicate its purpose. Secondly, we should define personal sales in the context of relationship marketing and indicate their purpose. Thirdly, we need to define a privileged relationship with customers. Fourthly, we need to introduce the competence development level of personal agents. Fifthly, it is necessary to develop the authors' questionnaire to assess the competence development level of personal agents. Sixthly, we need to substantiate the use mathematics in marketing and to propose a formula for assessment of the competence development level of an individual employee, a formula for assessment of the average competence development level of all employees, a formula for assessment of the development level of all competences of personal agents.

2 Theoretical foundation of personal sales in the context of relationship marketing

2.1 Relationship marketing - a modern marketing paradigm

The relationship-marketing paradigm is a bright trend of the 21st century recognized by scientists and marketing practitioners. This interesting, significant, inherently strong concept is in the development stage and requires the attention of the scientific community with respect to improving its methodology. Based on the analysis of the definitions of relationship marketing [1, 2], we give the following definition. Relationship marketing is a modern scientific and practically new marketing paradigm, which is based on the construction, maintenance and development of privileged relationships with stakeholders of the company. The stakeholders may be customers, employees, business partners, and members of the financial communities.

The novelty and features of our definition are as follows:

First, the vision of relationship marketing as a scientific and practical marketing paradigm. The perception of relationship marketing as a paradigm of a scientific and practical nature involves the assignment of a more honorable and significant place to relationship marketing in marketing theory and practice. Experience shows that adherents of the paradigm under consideration do indeed receive valuable powerful advantages in fierce competition.

We believe that modern marketing is multidisciplinary. Mathematics is a science that modern marketing needs. To achieve the goal of our article, it is necessary to apply knowledge in the field of mathematics. Mathematical formulas are important tools that will definitely come in handy for assessment of the competence development level of personal agents in a modern environment.

Secondly, the importance of segmenting customers into “key” and “non-key”. For obvious reasons, highly qualified sellers, in other words, should always serve key customers by personal agents. Key customers should get the best gifts, valuable bonuses and maximum discounts. Investments need to develop informal friendships with the most valuable group of clients.

Thirdly, the designation of certain groups of stakeholders – members of the financial community, members of the scientific community, “needy”, the state, medical institutions. Recently, there has been an urgent need to establish close ties between companies and these groups. This need is international in nature. Developing and strengthening ties with these groups will give companies a number of understandable benefits. For example, the development of relations with the state gives the company the opportunity to receive subsidies for business development, pay fair taxes, and stably import goods. We note that the “needy” group should include individuals and legal entities, such as orphanages, nursing homes, charitable organizations, environmental organizations, medical institutions, educational institutions, etc. The key goal of interacting with the “needy” is to address important social problems of society.

Fourthly, the emphasis on satisfying not only a wide range of needs and requirements, but also the desires and other stakeholders. Stakeholders are becoming increasingly demanding of companies. It is important to show flexibility, resourcefulness and imagination in the process of negotiating, concluding a deal and maintaining further contacts with all stakeholders. The more wishes, whims and whims of the stakeholders are satisfied, the higher the level of well-being of the stakeholders is, and the more loyalty they will show in relation to the company, the more profit the company will receive.

Fifthly, to meet the needs of not only stakeholders, but also society. We believe that the mission of each company should include presence of the social aspect of activity. The relevance of the emphasis on caring social needs is indicated by the popularity of such areas in economic science as the theory of resource efficiency, social marketing, and the green economy. In our opinion, caring for social needs will help to realize the real personal significance of the life of the company and strengthen the positive image in the eyes of the public.

In our opinion, the goal of relationship marketing is to build, maintain and develop privileged relationships with company stakeholders in order to obtain mutual benefits and help the community. We believe that the purpose of the modern marketing paradigm should contain a social aspect. We believe that caring for society is the trend of the 21st century economy.

We agree with the opinion of K. Möller and A. Nalinen [3] that supplier-consumer relationships undoubtedly remain the focus of marketing science. J. Mitchell [4] notes that buyers wish companies that focus on relationships; they want to be “pampered”. Relationship-oriented sales inevitably lead to high productivity and high profitability. We note that the efforts of company management and employees should concentrate on meeting needs of high levels. The more sophisticated customer needs are, the higher their level of subjective well-being will be. We note that the competence model is an effective tool, which can satisfy the highest needs of customers. Next, we will focus on nature of personal sales in the context of relationship marketing.

2.2 The nature and role of personal sales in the context of relationship marketing

A change in marketing paradigms, namely the transition from traditional marketing to relationship marketing, implies a significant change in outlook on all the classic tools of integrated marketing communications, including personal sales. At present, the role of personal sales is noticeably increasing and they are becoming a key tool for integrated marketing communications for building relationships with customers.

Based on the analysis of basic definitions of personal sales [5, 6] and accounting for the relationship-marketing environment, we give the following definition of personal sales.

A. Ulyanovskiy noted the polarity between personal and non-personal forms of communication with the buyer. He believes that the personality of the seller and his communication skills play an important role. He is the seller who is able to evoke and consolidate positive emotions in the consumer of the product (service) [6]. A personal sale is a relationship that arises between customers and personal agents (companies) because of personal contact between two parties in connection with the sale of goods (provision of services) or other interaction. The effectiveness depends on the personal agents owning modern sales technologies. The main novelty of the author's definition is that a personal agent must master modern sales techniques to achieve their goal.

The use of the word "relationship" in the definition of personal sale given by A. Tolkachev [5] expands the range of goals of this tool of marketing communications. The company's employees face with the task of not only selling goods, but also establishing relationships that are desirable for both parties. The purpose of personal sales is to build, maintain and develop privileged relationships between customers, mainly key, and personal agents (company), reinforced by the activation of a positive response from customers related to the purchase of goods (services). The personal sales goal specified by the authors corresponds to the relationship-marketing environment due to a shift in emphasis from the sale of goods to the availability of privileged relationships. In our opinion, personal interaction should include any interaction between a client and an employee of the company, based on personal "face-to-face" contact. We should understand that personal sales are relationships.

Let us explain that in connection with our personal sales goal, privileged relationships in paper mean valuable, strong, long-term, mutually beneficial, trusting, warm and other positive quality relationships that are a valuable competitive advantage for companies, allowing them to develop in a dynamic market environment and occupy leadership positions, market position. We agree with the researchers that the choice of a profession is a prerequisite for life self-determination, i.e. the success and harmonization of the trajectories of life of the young generation are due to professional self-determination [7]. The personal agent must consciously make a choice of professions.

The literature presents an interesting universal model of stages of customer relationships, where we divide customers into 4 groups: "Reliable", "Potential reliable", "Potential hopeless", and "Hopeless" based on their level of satisfaction, trust, and involvement [8]. Customer's loyalty in the modern world directly depends on the seller's skills.

Thus, the role of personal sales in comparison with advertising, sales promotion, public relations, direct marketing in the relationship-marketing environment is noticeably increased and the effectiveness of personal sales depends primarily on the degree which key agents possess key competences.

3 The competence model and stages of assessment of the competence development level of personal agents

3.1 Personal agent competence model

Previously, we have developed a competence model for personal agents and described behavioural indicators for each competence [9]. In the article, we understood competence as the basic quality of an individual that has a causal relationship to effective and / or best performance based on the criteria in work or in other situations. L. Spencer and S. Spencer, who designated five basic qualities, gave this successful definition: motives, psychophysiological characteristics, "I-concept", knowledge and skills [10]. A distinctive feature of the proposed authors' competence model for personal agents is that it includes three groups of interested parties – customers, sellers and company executives. We divide the twenty-four competencies into seven clusters, based on the target orientation of each competence. The following is a personal agent competence model.

Table 1. Personal agent competence model [9].

Cluster	Competence
Cluster 1 Development of internal resources	Positive thinking, personal involvement, control, risk acceptance
Cluster 2 Influencing	Clients' impressions management, awareness of clients psychology, political acumen, product knowledge and its presentation
Cluster 3 Interpersonal effectiveness	Focus on satisfaction, trust, involvement, diagnostic understanding
Cluster 4 Personal effectiveness	Stress resistance, self-confidence, exquisite style
Cluster 5 Action and achievement	Focus on result, initiative, information search, efficiency
Cluster 6 Value orientation	Individual approach, loyalty to company, healthy lifestyle
Cluster 7 Innovative approach	Creative potential, focus on relationship

Table 2. Behavioural indicators of the cluster "Influencing" [9].

Competence	Behavioral indicators
Impressions management	Personal agent cares about customers' benefit and profit of the company tries to have beneficial influence on clients. He correctly identifies the motives and needs of customers, solves customer's problems; uses simple and complex methods of persuasion; gives effective presentations and answer questions confidently; demonstrates sophisticated style; identifies priority of clients; uses an individual approach to customers; conducts customer segmentation and adjusts his behaviour.
Awareness of clients' psychology	Personal agent successfully implements customer segmentation on the psychological basis; models his behaviour; uses recommendations for working with clients of different psychological types.
Political acumen	Personal agent successfully determines the hierarchy in the group of customers; focuses on members of the group of customers who make a purchase decision; keeps knowledge about the psychology of the customer; predicts the impact of events or situations on customers; shows flexibility in communication; has an impact on people's behaviour; causes positive emotions.

Product knowledge and its presentation	Personal agent knows the range of goods; shows flexibility; has good presentational skills; changes the content of the speech according to the distinctive features of the audience; has the skills of self-presentation; influences customer opinions.
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We note that the presented model of competences is universal in nature and can be applied by companies engaged in personal sales in any markets for goods (services). Next, we will describe in detail the stages of assessment of the competence development level of personal agents.

3.2 Stages of assessment of the competence development level of personal agents

The main purpose of applying the author's model of competences of personal agents is the growth of key indicators characterizing the effectiveness of personal sales. A competence model is necessary not only for creating a corporate system of personnel training and development, but also for an important personnel assessment process in the context of personal sales management.

Let us imagine the stages of assessment of the competence development level of personal agents. In this case, we should clarify that by the level of competence development we will understand the degree to which an employee displays one of twenty-four competences.

We offer the following stages of assessment of the competence development level of sale staff:

- setting goals and objectives;
- formation of a working group;
- data collection tool selection;
- calculation of competence development indicators;
- development of recommendations.

Defining goals and objectives is the first stage in assessment of the competence development level of personal agents.

It is important to be aware of the purpose of the assessment. In general, we conduct assessment to gain knowledge about the competence level of a particular personal agent, i.e. how successfully he copes with his job responsibilities. We need to pay attention directly to a group of sellers of the certain department or to all personal agents working within company. One needs to have an idea of why the information received is required. First, based on the data obtained, it is possible to make decisions on transferring an employee to a lower or higher position, to apply an individual approach with material and non-material incentives for a personal agent. Secondly, we need to take into account the knowledge about the competence development level of a particular personal agent to develop an optimal training program for a person. Thirdly, we need to assess the development level of core competences to make effective decisions when hiring staff. More details about the competence-based approach and its role in training specialists are given in the article [11].

It is important that the management of the company inform employees about the goals and objectives that form the basis of the methodology for assessment of the competence development level of personal agents. This will help reduce social tension in a team and increase interest and enthusiasm in the process of conducting the assessment process by people.

The formation of the working group is the second stage of the competence development level.

We consider it appropriate to identify three groups of people. The first group of researchers is to guide the research process; the second is to assess the competence

development level of sales personnel directly. The task facing the third group is to calculate the competence development indicators and develop recommendations. We should note that the second group could include both employees and people from the side who perform supervisory functions, as well as personal agents themselves. In other words, sellers can independently evaluate their own level of development of each competence.

Choosing a tool for collecting data is the third stage in assessment of the competence development level of employees.

At this stage, there should be the choice of a tool or the group of tools, which will help to obtain information about the level of development of twenty-four competences that a company employee should have in a relationship-marketing environment.

As a new tool, we offer the authors' questionnaire, which contains 72 statements in Table 3.

Table 3. Questionnaire for assessment of the competence development level of personal agents.

Questionnaire # ___		
Dear respondents!		
Please give points from 0 to 10 opposite each statement		
Competence name	Personal agent – ...	Assessment
Positive thinking	1. A person who is satisfied with life	
	2. A person who has a positive perception of the world	
	3. A person who gives the impression of a loser	
Personal involvement	4. A person who enjoys his work	
	5. A person who is optimistic in his work	
	6. A person who is not on his place	
Control	7. A person who can help to resolve the conflict	
	8. A person who monitors the situation in the workplace	
	9. A person who gives the impression of a helpless person	
Risk taking	10. A person who can perform a customer request	
	11. A person who may take a risk	
	12. A person who prefers no "surprises" in the workplace	
Impression management	13. A person who provides valuable guidance	
	14. A person who offers a product that the customer needs rather than one that is more expensive	
	15. A person who only cares about his own profit or profit of the company	
Knowledge of customer psychology	16. A person who makes an impression of a person with whom you have long been familiar	
	17. A person who shows interest in the client as a person	
	18. A person who demonstrates a superficial attitude and can behave indifferently	
Political insight	19. A person who aims to communicate with the member of the group who makes the purchase decision	
	20. A person who takes into account the interests of the group member who pays	
	21. A person who demonstrates ignorance in terms of the balance of power in the group	
Knowledge and product presentation	22. A person who quickly answers all questions related to the product	
	23. A person who skillfully demonstrates and conducts product presentation	
	24. A person who gives incomplete answers to customer questions and ineptly advertises goods	

Satisfaction orientation	A person who takes care of keeping client resources	
	A person who identifies customer needs	
	A person who does not care about the client	
Engagement orientation	25. A person who complies with actions, accompanying companies	
	26. A person who holds informal clearance with customer	
	27. A person who always avoids close communication with the client	
Trust orientation	28. A person who is credible	
	29. A person you can rely on	
	30. A person you cannot rely on	
Diagnostic understanding	31. A person who quickly understands what the client wants	
	32. A person who responds to the client's mood	
	33. A person who shows indifference to changing emotions of the client	
Resistance to stressful situations	34. A person who stays calm and judicious in stressful situations	
	35. A person who can be reserved	
	36. A person who emotionally -aggressively reacts in a stressful situation	
Self-confidence	37. A person who gives the impression of a confident person	
	38. A person who makes independent decisions without regarding to management	
	39. A person who gives the impression of a "weak link"	
Exquisite style	40. A person who looks neat, beautifully and stylish	
	41. A person who always looks good	
	42. A person who looks ridiculous and untidy	
Result orientation	43. A person who shows enthusiasm for the work	
	44. A person who unobtrusively offers to purchase related products	
	45. A person who gives the impression of a man who wants to go home soon	
Initiative	46. A person who takes the initiative	
	47. A person who reminds about yourself or company	
	48. A person who interrupts contact with a client ahead of time	
Search for information	49. A person who asks relevant questions	
	50. A person who fixes client information	
	51. A person who is not interested in client's needs	
Efficiency	52. A person who looks energetic	
	53. A person who moves quickly	
	54. A person who often looks tired	
Individual approach	55. A person who takes care of the client	
	56. A person who satisfies individual client's needs	
	57. A person who treats all clients equally	
Company loyalty	58. A person who speaks highly of his company	
	59. A person who sets an example of the director's actions	
	60. A person who speaks unflattering about a company or management	
Healthy lifestyle	61. A person who ignores bad habits	
	62. A person who gives impression of a healthy person	
	63. A person who has bad habits or unhealthy look	

Creative potential	64. A person who offers interesting options for the use of the product	
	65. A person who has the ability of thinking outside the box	
	66. A person who has stereotyped thinking	
Relationship orientation	70. A person who demonstrates a client oriented approach	
	71. A person who contributes to the strengthening of relations with the client	
	72. A person who is unwilling to make a good impression	

We divided all into twenty-four groups and directly related to core competences of personal agents. Three statements correspond to a separate competence, two of which are positive and one is negative. Each statement characterizes the activities of a personal agent and we evaluate it with a scale from zero to ten points. We note if the company decides to include additional competences in the model, it is necessary to develop statements characterizing the development of new competences and include them in the questionnaire.

Calculation of indicators of development of competences is the fourth stage of assessment of the competence development level of personal agents.

In our research, we proposed three indicators. The first indicator is the "individual competence development indicator" or "private indicator". It characterizes the level of development of specific competencies of a personal agent. The second indicator is the "core competence development indicator", which characterizes the level of development of all the competences of a personal agent. It can be simply general. We consider it important to propose the third indicator, which is the "average indicator of the development of core competencies". It characterizes an average level of development of all employee competences.

First, we present a formula for assessment the level of the private competence development of personal agents:

$$CDI_{\text{private}} = (O_{y1} + O_{y2} - O_{y3}), \quad (1)$$

where CDI_{private} – competence development indicator (scores);

O_{y1} and O_{y2} – assessment of positive statements (scores);

O_{y3} – assessment of positive statements (scores).

Let us explain that the value obtained in evaluating negative statements should be subtracted in calculating all the indicators presented. Note that the maximum value of the development indicator of an individual competence is 20 points.

Secondly, we present a formula for assessment of the development level of all competences of personal agents:

$$CDI_{\text{core}} = (1O_{y1} + 1O_{y2} - 1O_{y3}) + (2O_{y1} + 2O_{y2} - 2O_{y3}) + (NO_{y1} + NO_{y2} - NO_{y3}) \quad (2)$$

where CDI_{core} – core competence development indicator (scores);

$1O_{y1}$ and $1O_{y2}$ – assessment of positive statements characterizing the first competence (scores);

$1O_{y3}$ – assessment of negative statements characterizing the first competence (scores);

N – Competence number.

We should clarify that the number in front of O_{y1} , O_{y2} , O_{y3} , corresponds to the competence number. Note that the maximum value of the development indicator of all competences of personal agents is equal to 480 points.

Thirdly, we present a formula for assessment of an average level of development of all employee competences. You can take any number of competences of interest:

$$CDI_{\text{average}} = ((1O_{y1} + 1O_{y2} - 1O_{y3}) + (2O_{y1} + 2O_{y2} - 2O_{y3}) + \dots (NO_{y1} + NO_{y2} - NO_{y3}))/K \quad (3)$$

where CDI_{average} – average competence development indicator (scores);

K – number of competences.

Therefore, we explained remaining variables of the formulas. Note that the maximum value of the development indicator of a separate competency is 20 points.

Therefore, with the proposed formulas, the company's researchers will be able to determine the level of development of individual competencies, the level of development of all competencies and an average level of development of all competencies of personal agents.

Development of recommendations is the fifth stage in assessment of the level of development of competencies of sales personnel.

We emphasize that the last stage of assessment of the competence development level of sales personnel is mandatory. We propose designating four groups of personal agents based on the competence development level of personal agents. The first group is called "incompetent", and it includes those personal agents who scored from 0 to 120 points inclusive during the assessment. The second group is "inert". It includes those personal agents who scored from 121 to 240 points inclusive. The third group, which is "experienced", should include those employees who scored from 241 to 360 points inclusive. Moreover, in most competent group, we recommended to include personal agents who scored from 361 to 480 points inclusive. The fourth group is "professional". When we determined which group a particular personal agent belongs to, we advised managers to perform the following actions. If the employee is in the first group, then he should be dismissed or transferred to another position that is not related to personal sales. If the personal agent belongs to the "inert" group, we recommended transferring him to another department. He might leave his previous position and actively train. In the second case, it is advisable for the seller to begin official duties only after re-evaluating of the development level of core competencies.

We also should note that sellers who entered the first two groups are probably not on their workplace. In most cases, they have a negative impact on a personal sale performance. Company executives should not allow people in the first two groups to make personal sales.

In the case when the employee scored a sufficient number of points and he is a representative of the "experienced" group, we might give him training and additional rewards. More sellers belong to this group. We must strive to transfer sellers from the third group to the fourth. In this case, training will give results. Obtaining and assimilating knowledge in practice, a personal agent over time will increase the development level of underdeveloped competencies and move into an elite group.

If an employee falls into a "professional" group, then we should transfer him to another one, more significant position, substantially reward. This is the most valuable group, and management should ensure that personal agents are loyal to the company.

It is also advisable to follow the presented stages of assessment of the competence development level of personal agents in the process of managing personal sales to assess personnel and develop the main competencies of personal agents. As you know, the management process without fail includes control. In the work, the proposed evaluation system is the final link for the effective management of personal sales based on relationship marketing and competence models.

4 Results

Thus, the authors developed theoretical provisions of relationship marketing and personal sales. The authors presented the definition of relationship marketing and its purpose. The paper outlined the purpose of relationship marketing – to build, maintain and develop privileged relationships with the company's stakeholders in order to obtain mutual benefits

and help to society. The authors focused on definition of personal sales and personal sales' target. The paper described behavioral indicators characterizing demonstration of competences and proposed stages of assessment of the competence development level of personal agents. The paper revealed the authors' questionnaire to assess the competence development level of personal agents.

5 Conclusion

Thus, the article gave the author's definition of relationship marketing. Personal sales are relations that arise between customers and personal agents (company) based on personal contact between the two parties in connection with the sale of goods (provision of services) or other interaction, the effectiveness of which depends on the personal agents owning modern sales technologies. The authors considered all the stages of assessment of the competence development level of personal agents and represented three important formulas for assessment. The topic needs working on further.

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