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The Impact of Values Congruence on Sales Personnel Performance and Retention:

A Person-Organization Fit Analysis

by

Jason Wade Duke

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree

Of

Doctor of Business Administration

In the Robinson College of Business

Of

Georgia State University

GEORGIA STATE UNIVERSITY
ROBINSON COLLEGE OF BUSINESS
2022

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Acceptance

This dissertation was prepared under the direction of the Jason Duke Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Business Administration in the J. Mack Robinson College of Business of Georgia State University.

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DISSERTATION COMMITTEE

Dr. Danny Bellenger (Chair)

Dr. Wes Johnston

Dr. Todd Maurer

Dedication

Firstly, I dedicate this to my wife, Irene Marcos Carlús. I could not have accomplished this journey without your love and support. Thank you, and I love you.

Secondly, I dedicate this to my three beautiful children: Olivia Madeline Duke, Benjamin Warren Duke, and Oscar Wade Duke Marcos. I had to spend less time with you than I wanted to. However, I hope you realized through my journey that you are capable of anything you set your mind to with hard work and a little luck along the way. I love you all more than you will ever know.

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Abstract

Sales performance and salesforce turnover are vital concerns for businesses and organizations everywhere. Too, much work has been performed within academic research on the impact of performance on companies and the antecedents to predicting individual salesperson performance and intent to remain. Much work has also been committed to further the concept of Person-Organization Fit (P-O Fit) related to organizational success or failure. In this paper, I will conduct a quantitative analysis of a cloud services company's sales personnel to establish the impact of values and normal congruence on individual salespeople's performance and intention to remain. This research will fill an essential gap in the literature by combining the concepts of P-O Fit and Salesforce Socialization. This data will provide critical insights and guidance for practitioners when making salesforce hiring decisions.

INDEX WORDS: Person-Organization Fit, P-O Fit, Sales Performance, Intention to Remain, Employee Retention

I Introduction

The field of sales management is of critical importance to both the academic world and practitioners. Concerning practitioners, sales is an essential part of nearly all endeavors. Businesses and organizations are dependent upon the revenues generated from sales to cover current expenditures and help with market expansion ([Joshi & Randall, 2001](#)). A company's salesforce is an integral component of the firm's strategic planning and execution. Indeed, it is seen by some senior executives as a strategic advantage of the firm itself ([Cron et al., 2014](#)). In a 2010 study by Albers et al., the authors revealed that expenditures on salesforces have a greater impact on revenues than advertising ([Albers et al., 2010](#)). In nearly all businesses, the more effective the salesforce, the more revenue is generated. A healthy and effective salesforce is essential for many organizations, and naturally the success of organizations at a holistic level has a positive effect on the overall economy, whether that be domestic or global.

I.1 Research Motivation

Sales management necessarily deals with sales performance, both at the group and individual levels. At best, without effective sales performance, organizations cannot grow. They may be relegated to the sidelines of their market, or, in a worst-case scenario, they may disappear altogether. At the individual level, effective performance by sales personnel is required for both the maintenance and the further growth of their respective organizations ([Joshi & Randall, 2001](#)). At its core, the sales organization is responsible for implementing both marketing and business strategies of its parent organization ([Baldauf & Cravens, 2002](#)). Additionally, within the domain of Sales Management, the retention of personnel is of additional concern. The loss of sales personnel can be costly to organizations, mainly when the lost resources are high performers.

Perhaps because of its real-world importance, the academic domain is well explored and

remains very active. Because of its critical role in the success of many businesses, sales management is well-served to identify those factors and aspects that impact both sales performance and salesperson retention. While much progress has been made to identify the antecedents of both salesperson performance and retention, gaps remain worth exploring.

One of the early seminal articles that looked at the determinants of salesperson behavior was a meta-analysis conducted by Churchill and others ([Churchill Jr et al., 1985](#)). Covered in more detail later, the predicted determinants of salesperson performance were, broadly: personal factors, skill, role variables, aptitude, motivation, and organizational/environmental factors ([Churchill Jr et al., 1985](#)) in a re-visit of this topic in 2011 refined those determinants to identify the top five, in order of most impactful to performance: selling-related knowledge, degree of adaptiveness, role ambiguity, cognitive aptitude, and work engagement ([Verbeke et al., 2011](#)). What was not explicitly covered in this meta-analysis was a look at the impact of **Values Congruence** on a salesperson's performance. While covered in more detail later, values congruence can be considered as the degree to which an individual's value system matches that of the company for which they work.

The other key outcome under consideration in this dissertation is salesperson retention. Propensity to leave, which can be thought of as the opposite of intention to remain, has been a topic of seemingly limited research related to salesperson characteristics. Fournier et al. did provide a conceptual model of this construct in a 2010 paper. In that paper, a salesperson's propensity to leave was studied under the moderating effects of the organization's ethical climate to which the salesperson belongs ([Fournier et al., 2010](#)). Once again, **Values Congruence** has not, to my knowledge, been studied as a potential determinant of a

congruence as a possible driver of both salesperson performance as measured by sales

quota attainment and intention to remain and organizational commitment.

I.2 Area of Concern

As it relates to both salesperson performance and retention (hereafter intent to remain for this study), sales management is a widely studied field in academia. Sales performance can be characterized in several ways. In a published study in the Journal of the Academy of Marketing Science, referred to these as “salesperson performance operationalizations,” or SPOs ([Bolander et al., 2021](#)). At its most generic level, salesperson performance can be defined as “behavior that has been evaluated in terms of its contribution to the goals of the organization” ([Walker et al., 1979](#)). This can then be broken down into four broad categories: Activity-based, outcome-based, conversion-based, and relationship-based, where:

- Activity-based performance deals with items such as pipeline development and progression.
- Outcome-based performance concerns actual sales results.
- Conversion-based performance compares inputs to outputs and is often operationalized as win rate.
- Relationship-based performance deals with metrics around customer retention, loyalty, and net promoter score ([Bolander et al., 2021](#))

While all performance metrics can be considered a valid representation of overall sales performance, this paper will focus on outcome-based SPOs. Furthermore, these can be broken into two categories within the outcome-based SPO group: raw and comparative. Raw outcome-based SPOs include such items as raw sales volumes like total revenue, profit, etc. Comparative units are items such as Sales to Quota ratios or SQR's ([Bolander et al., 2021](#)). SQR

will be utilized within this study as one of the dependent variables.

The authors mentioned above found broad support for outcome-based SPO's within their literature review and their formal survey of sales practitioners. While salesperson performance as it relates to business outcomes is essential to both researchers and practitioners, so is the concept of salesperson retention. Perhaps the most challenging job to fill is that of a salesperson ([Rivera, 2007](#)). Richardson in 1999 broke these costs into four primary dimensions: direct costs, indirect costs, replacement costs, and training costs ([Richardson, 1999](#)). One of the problematic areas for retention is how to measure it best. While easy to calculate, actual turnover does not lend itself well to data collection around the "why" the individual salesperson left. Therefore, researchers often use the concept of "propensity to leave" as a substitute measure ([Fournier et al., 2010](#)). The correlation of propensity to leave has been confirmed by sales research over the years by various studies. I will use the same concept for this study but taken in the positive context where "intent to remain" is the converse of "propensity to leave."

I.3 Expected Contribution

The domain is sales management is well-established, as are the concepts of performance and intention to remain within that domain. However, to my knowledge, no research has empirically tested the impact on performance and intention to remain utilizing **Values Congruence**. This study should yield insights of use to both researchers and practitioners. Within the domain of study in research, this study will empirically test the effect of **Values Congruence** on salesperson performance and intention to remain and thus help tie two key concepts together: Salesforce Socialization and Person-Organization Fit. To the practitioner, the study should provide guidance and insight into the relative importance of values and norms congruence during the hiring phase. At this early stage, the hiring managers or human resources

groups should better predict the success from the prospective candidates.

I.4 Proposal Structure

The organization format for this dissertation is based on the research design approach found in ([Mathiassen, 2017](#)). This is represented in the below [Table 1](#):

Table 1

Template for Research Design

Component	Specification
Problem (P)	Sales organizations' performance variability and turnover. Human resources and hiring managers need better tools to evaluate potential sales hires as the cost of failure is high
Area of Concern (A)	Sales Performance and Retention (Intent to Remain)
Framing (F)	F_a Organizational Socialization and Congruence F_i Person-Organization Fit (P-O Fit)
Method (M)	Quantitative study based on cloud company's sales force survey to measure Values Congruence as an independent variable and sales quota attainment percentage and intention to remain as dependent variables. Multiple regression analysis will be used.
Research Question (RQ)	What is the impact of salesperson-organization value congruence on individual sales performance as measured by quota attainment percentage and intention to remain scores

<p>Contribution (C)</p>	<p>C_a this will contribute to the academic area of interest by empirically testing the impact of Values Congruence on salesperson performance and intention to remain.</p> <p>C_p This research will provide a tool for human resources and hiring managers of sales personnel to evaluate the new hires.</p>
-----------------------------	---

II Literature Review

This paper provides a literature review of research related most prominently to the concept of Value Congruence, specifically as it concerns the domain of Person-Organization Fit. The purpose of the study being conducted is to fill an apparent empirical gap in the body of knowledge today around this topic, specifically with respect to the impact of **Values Congruence** on the performance and intention to remain of sales personnel within organizations.

II.1 Conceptual Background

Salesperson performance and intent to remain are both topics that have been studied from various lenses and frameworks. One of the key conceptual frameworks I will utilize within this study is that of Organizational Socialization (OS). This theory was primarily formed in the 1960s and 1970s by researchers Edgar Schein ([Schein, 1968](#)), John Van Maanen ([Van Maanen, 1975](#)) and L.W. Porter et al. ([Porter et al., 1975](#)). Organizational socialization is a process that looks at how individual employees find their way in organizations. This model was extended and empirically tested in 1976 by Daniel Feldman ([Feldman, 1976](#)) where the author identified three distinct stages within this process. These will be covered in more detail in a following section; however, as part of this work, Feldman introduces the concept of *Congruence*, which is of particular use to this study.

Then, in 1986 researchers Dubinsky, Howell, Ingram, and Bellenger applied this framework for the first time to sales organizations ([Dubinsky et al., 1986](#)). Through empirical testing, the authors made several key findings and produced a model which will be utilized in this study and is shown in [Figure 4](#). This model will be covered in more depth in the literature review session, but of note here, the congruence values. Also note that I will be focused on those components in red text.

The other main framework that I will utilize in this paper is Person-Organization Fit (P-O Fit). P-O Fit was introduced in 1989 by Jennifer Chapman([Chatman, 1989](#)). Chapman derived this framework from earlier work done by Kurt Lewin on Person-Environment Fit ([Wikipedia](#)). Chapman's seminal work on this topic focused on the importance and impact of individuals on organizations and, similarly, organizations on individuals. Specifically, Chapman defined P-O Fit as "the congruence between the norms and values of organizations and the values of persons" ([Chatman, 1989](#)). Chapman's model is shown in [Figure 5](#).

II.2 Socialization

II.2.1 Organizational Socialization

Organizational Socialization was formed through the 1960s and 1970s through a variety of researchers' contributions. Of particular note is the work done by Daniel Feldman in his 1976 paper entitled "A Contingency Theory of Socialization" ([Feldman, 1976](#)). Feldman built upon earlier work by Van Maanen, Schein, Porter, and others to define the process of organizational socialization and to provide a model of individual socialization into those organizations. The model produced by Feldman first described three distinct phases that occur during the process of organizational socialization. These phases were: Anticipatory Socialization, Accommodation, and Role Management ([Feldman, 1976](#)).

Anticipatory Socialization is the first step in the process, according to Feldman. The activities in this stage occur before the individual enters the organization. In other words, these occur during the hiring process. Feldman identified two process variables that were present during this phase: Realism and Congruence. Realism is defined as "the extent to which individuals have a full and accurate picture of what life in the organization is really like. It indicates how successfully they have completed the information sharing and information

evaluation part of their recruitment” and Congruence is defined as “the extent to which the organization's resources and individual needs and skills are mutually satisfying. It indicates how successful individuals have been in making employment decisions.” ([Feldman, 1976](#)). Of particular interest to this study is the concept of congruence. I look to expand upon this definition with the research conducted in this study. Rather than focus on the needs and skills of individuals and their impact on downstream outcomes, I will look at the impact of **Values Congruence** between the individual and organization. **Values congruence** is the degree to which an individual’s norms and values match those of the organization they belong to. This definition is analogous to the concept of Person-Organization Fit, which will be covered in a subsequent section of this literature review.

Accommodation is the second stage in Feldman’s model and begins when the individual is hired into the organization. During this phase, the individual can ascertain the true nature of the organization and attempts to become a functioning member thereof ([Feldman, 1976](#)). While formative and essential to the overall process of organizational socialization, the focus of this paper is primarily on the Anticipatory Stage.

Lastly, the Role Management stage deals with how individuals deal with conflict within the organization. These can and do include both internal and external conflicts and demands on the individual. Similarly, this phase of the process is not the primary focus of this paper.

Feldman also defined four outcome variables that would measure this process of organizational socialization. These are General Satisfaction, Mutual Influence, Internal Work Motivation, and Job Involvement. Of interest to this study, broadly, is the concept of General Satisfaction, which is a measure of the overall satisfaction and happiness an individual has in their work ([Feldman, 1976](#)). One important callout to this model is that it does not measure

actual performance outcomes.

Empirically, Feldman surveyed hospital employees for his study. The results of his study show significant correlations between the process variables defined in the Anticipatory, Accommodation, and Role Management phases with the outcome variable. Results can be seen in [Figure 6](#). Note that Congruence (of needs and skills) is significantly positively correlated to General Satisfaction, thus providing a basis for utilizing this framework for this research.

II.2.2 Salesforce Socialization

Salesforce Socialization was defined by Dubinsky, Howell, Ingram, and Bellenger and it builds upon the framework developed by Feldman ([Dubinsky et al., 1986](#)). Dubinsky et al expanded and added to this framework in a very important manner for my research. First and foremost, the authors applied the model specifically to sales personnel, which had not been attempted prior to their paper. Sales personnel have unique characteristics can affect the socialization process. One of the more important of these characteristics are that salespersons are often separated from other staff within an organization; whether that be physically, socially, or psychologically ([Dubinsky et al., 1986](#)). Too, salespersons work at the interface between the organization and its customers. Their locus of control is often different than other organizational employees.

While the basis for the work done by Dubinsky et al was Feldman's model, the authors tested two different forms of the model to determine whether it empirically held up when applied to sales personnel specifically. The authors applied three assumptions based upon the Feldman model. Firstly, that the anticipatory stage occurs prior to the accommodation stage. Secondly. The accommodation stage occurs prior to the role management stage. Lastly, the process variables in any particular stage directly influence only variables in the succeeding stage

([Dubinsky et al., 1986](#)). It was noted that in the original Feldman study, the third assumption did not hold up, so Dubinsky et al added another model whereby the third assumption was relaxed.

The study involved sending questionnaires to 2000 senior level sales managers within the United States. The managers were asked to send the questionnaire to their least experienced sales executive. This is key because it is more likely that a newly engaged hire would recall anticipatory job assumptions more accurately than those with longer tenure. The results showed that Congruence was once again significantly positively correlated with General Satisfaction. See [Figure 7](#). The confirmation of this correlation as it applies to sales personnel is key to this study.

Lastly, Dubinsky et al created a modified model of organizational socialization called “Model of Salesforce Socialization”. It is shown directly below (see [Figure 8](#)) and the congruence component forms a key aspect of this authors proposed model in the methodology section.

II.3 Value Congruence

II.3.1 Value Congruence and Person-Organization Fit

Person-Organization Fit (P-O Fit) is a model introduced in 1989 by Jennifer Chatman and is defined as the congruence between the values and norms of organizations and people within those organizations ([Chatman, 1989](#)). Conceptually, P-O Fit can be considered a domain within the overall theory of Person-Environment Fit (P-E Fit). At its most basic roots, P-E theory originated from Kurt Lewin and his famous maxim, also known as Lewin’s equation, which is $B = f(P, E)$. This equation merely represents that behavior is a function of both a person and their environment ([Wikipedia](#)). Robert Caplan credits authors French, Rodgers, and Cobb’s work in 1974 with providing the framework with which much of the work on person-environment theory has progressed into the organizational behavior space ([Caplan, 1987](#)). In addition to the P-O Fit

domain with P-E Fit, additional domains from broadest to narrowest include Person-Vocation Fit (P-V Fit), Person-Group Fit (P-G Fit), and Person-Job Fit (P-J Fit). P-O Fit is the topic of concern for this study and occupies the space between P-V Fit and P-G Fit.

According to Chatman, there are two main antecedents to the P-O Fit construct; individual characteristics, which are values of the individual, and organizational characteristics, which are the values or norms of the organization for which the individual works for ([Chatman, 1989](#)). Within Chatman's framework, the outcomes encompass both organizational and individual outcomes, but they were theoretical, not empirical at that point (see [Figure 5](#)).

One of the other seminal figures in the early development of P-O Fit literature was Amy Kristof. In her 1996 paper, Kristof introduced the concepts of complementary and supplementary fits to the P-O Fit framework to provide a more comprehensive and tighter definition of the conceptual model ([Kristof, 1996](#)). These concepts were first defined within the context of P-E fit by Muchinsky and Monahan in 1987 as follows: Supplementary congruence is the match between an individual and a group within an environment, whereas complementary congruence is a match between the talent's or abilities of an individual and a group ([Muchinsky & Monahan, 1987](#)). This is an important distinction to add to Chatman's work as it provides a separation between the term value congruence and P-O Fit. For example, value congruence is an additional measure, whereas P-O Fit can be comprised of both.

In 2015, researchers Vveinhardt and Gulbovaite published an exhaustive literature review of the multitude of models of value congruence as it relates to P-O Fit that has arisen since the seminal article by Chatman in 1989 ([Vveinhardt & Gulbovaite, 2017](#)). Their study consolidated decades of theoretical and empirical work on the subject specific to this author's area of interest and was thus integral to understanding the domain fully. In general terms, their work was divided

into studies that dealt with both the phenomenon of value congruence itself and studies that dealt with typology on how to effectively measure value congruence ([Vveinhardt & Gulbovaite, 2017](#)). Both concepts are essential to the formation of this research, and I will align the following sections of my review in a similar fashion.

II.3.2 The Phenomenon of Value Congruence

Much of the work started in 1989 on P-O Fit remained theoretical, and the models presented were not tested. In 2004, however, researchers Cable and Edwards conducted a study that extended the P-O Fit model in a theoretical context and then tested that extension empirically ([Cable & Edwards, 2004](#)). Additionally, the authors viewed the framework within the lens of both complementary and supplementary fits. The authors hypothesized three main components, but of interest to this research, one of the validated hypotheses was that **Values Congruence** does, in fact, independently affect employee attitudes.

Another empirical test of P-O Fit was conducted by Westerman and Cyr in 2004 as well ([Westerman & Cyr, 2004](#)). In addition to **Values Congruence**, the authors also integrate personality congruence and work environment congruence, which are other measures of supplementary fit but not of particular interest to this research. One of the key findings of their research was that **Values Congruence** directly impacted attitudes such as job satisfaction and commitment, and the employee's intention to remain, which is a key area of interest in this study. The representative sample for their research comprised sales and a variety of other functions across six organizations ([Westerman & Cyr, 2004](#)). (See [Figure 9](#))

In 2005, a substantial meta-analytical paper was composed based on studies conducted on four types of P-E fits, including P-O Fit. Of note was that these were all empirical studies and the authors sought to determine the effects of P-O Fit on a variety of outcomes

([Kristof-Brown et al., 2005](#)). The results of the meta-analyses, when accounting for the potential oversize impact of one study indicated strong correlations between P-O Fit and Job Satisfaction (.50), organizational commitment (.65), and intention to quit (-.47) ([Kristof-Brown et al., 2005](#)). Intention to leave is one of the dependent variables of interest in this study. This study's other dependent variable of interest is job performance, as measured explicitly by quota attainment. The study by Kristof-Brown and others indicated a low correlation between P-O Fit and job performance (.07) but given the natural obfuscation of that measure due to the number of studies, there remains an opportunity to test this linkage further empirically.

Lastly, concerning the concept of **Values Congruence**, Bao, Dolan, and Tzafrir in 2012 provided an integrated **Values Congruence** model that consolidated and synthesized the extant literature at the time ([Bao et al., 2012](#)). Of note, Bao et al. viewed their framework as multi-level. In this aspect, they are not limiting the framework to purely P-O fit. However, what is common and relevant for this study is that **Values Congruence** is shown to be related to job both job performance and intention to remain elements, which are the foci of this study.

II.3.3 Defining and Measuring Values Congruence

Like many fields and domains within the social sciences, **Values Congruence** and P-O fit suffer from definitional and measurement inconsistencies. To conduct the study effectively, this author will need to adequately define independent and dependent variables. Though already touched upon earlier, supplementary versus complementary fit is just one relatively simplistic aspect of the problem. Another critical aspect is commensurate measurement, which is describing both the individual and the organization in question within the same dimensions ([Kristof, 1996](#)). Kristof's position is that commensurability is desired for supplementary measures, such as those this study is interested in.

Leung and Chaturvedi in 2011 provided additional P-O fit definitions as part of a framework created and tested empirically to determine the validity of the various types to both organizational commitment and job satisfaction ([Leung & Chaturvedi, 2011](#)). The authors segmented P-O fit into Objective Fit, which they defined as the values espoused by the organization and the individual's perception of those organizational values based on experience. Perceived Fit was defined as a comparison between the individual's work environment and the description of the individual's desired work environment. Lastly, Subjective Fit is defined as the extent to which the individual perceives that they fit in the environment ([Leung & Chaturvedi, 2011](#)).

Bao et al. produced one of the most comprehensive definitions of the various types of fits. In their estimation, there were three distinct types of measures of value congruence, each of which could be utilized at all three applicable levels of P-E Fit: individual, group, and organization. Direct (or Perceived) value congruence measures the extent to which the individual and the entity in question's (for this study's purposes, the organization) values are congruent or matching ([Bao et al., 2012](#)). In contrast, two types of indirect measures are also present and distinct components of Values Congruence according to Bao et al. These are further bifurcated into subjective and objective aspects. Indirect subjective types are commensurate measures that take the individual's perspective and perspective of the other entity. In contrast, indirect objective types are commensurate measures that take the perspective of others outside of the individual for the outside entity ([Bao et al., 2012](#)). This is well summarized in [Figure 10](#). There is some debate in the academic community about which types of measures lead to more accurate results. In the meta-analysis by Vveinhardt and Gulbovaite, this issue was specifically discussed. In those authors' opinions, based on evidence from various enclosed studies, they believed that

subjective fit-type measures provided the most predictive power and thus will be the focus of this paper's methodology section and contribution.

Much has been accomplished in this domain from its inception in the late '80s. From a theoretical model beginning through a host of empirical testing and validation. Conceptually, it is known that there is a relationship between an individual's values and the organization's values. Furthermore, it has been established that there appears to be a strong correlation between the congruence of these two sets of values and positive outcomes for organizations such as job satisfaction, work engagement, ethical behavior, and others. Furthermore, it has been established that there appears to be a correlation between Values Congruence and the individual's intent to remain, which is a component of this study that I will look to further validate with results.

According to the studies out there, there is some correlation between Values Congruence between the individual and organization and job performance in a variety of functions. However, what has not been found in my foray into the domain is the impact of Values Congruence on performance as it relates to sales personnel specifically. For the academic audience, this research extends the domain of Values Congruence and P-O Fit by empirically testing the impact of Values Congruence on sales performance and intention to remain. For practitioners, this research will provide guidance and tools that human resources and hiring managers can utilize to better evaluate potential new hires in the sales function.

II.4 Performance and Organizational Commitment

II.4.1 Defining and Measuring Performance

The determinants or antecedents of salesperson performance have been researched since the early 20th century. One of the earliest consolidations of these decades of research was a meta-analytical review conducted in 1985 by Churchill, Ford, Hartely, and Walker ([Churchill Jr et al.](#),

[1985](#)). The purpose of this meta-analysis was to pull together the disparate research of the previous years to determine whether specific factors or antecedents could be gleaned from the data. Churchill et al. determined that six distinct conceptual antecedents emerged from the extant literature.

Aptitude was a critical concept that was found in the analysis. In this context, aptitude can be seen as an individual's natural ability. The authors found that while there was a correlation between aptitude and performance, it was relatively weak. *Skill Levels* were also an antecedent identified in the literature review. Skill levels were found to have a stronger correlation with performance than aptitude, but data also suggested likely moderation variables that affected this relationship. *Motivation* was a third factor found in their literature review. Motivation appeared to have a similar effect on Performance as Aptitude. *Role Perceptions* was found to be a relatively recently studied factor in their review and showed to be relatively weakly correlated. *Personal Variables* can be thought of as intra-individual characteristics that are not considered skills—for example, factors such as age, sex, weight, etc. Individual factors had one of the strongest correlations with performance when sampling error was accounted for. Lastly, *Organizational and Environment Factors* were identified in the research stream as well. This has the lowest correlation on average with performance ([Churchill Jr et al., 1985](#)). The primary finding of their meta-analysis was that no one specific factor explained a significant amount of variation in performance. This suggests that there is potentially much left to discover on this topic.

Twenty-five years after the meta-analysis conducted by Churchill et al., Verbeke, Dietz, and Verwaal conducted a more contemporary analysis to cover the interim period in sales performance research ([Verbeke et al., 2011](#)). Verbeke et al. refined Churchill et al.'s admittedly

broad categorizations by adding various sub-categories to the model based upon the research surveyed during the twenty-five-year timeframe. For the sake of brevity and relevance to the topic of this paper, I will focus on those five sub-categories that appeared to have significant correlations with performance. Based on their meta-analysis, the most impactful antecedent of performance was *selling-related knowledge*, which was defined as a sub-category of *Skill Level*. The authors found that product, technical, and customer knowledge were all key aspects of performance. *The degree of adaptiveness* was also found to be positively correlated with sales performance. This factor, which is also part of the *Skill Level* category, focuses on how sales personnel react to sales situations as they unfold. *Role ambiguity (a function of Role Perceptions)* was found to be negatively correlated to sales performance. *Cognitive Aptitude* and *Work Engagement* round out the correlated factors where the former is a component of the general category of Aptitude in Churchill et al.'s study and the latter a component of Motivation. Full results can be found in [Table 20](#). One of the additional vital takeaways of this study is that the way performance is measured has an obvious impact on that outcome. These moderators are an essential factor that needs to be accounted for as I seek to add to this domain.

With that last in mind, a recent study by Bolander, Chaker, Pappas, and Bradbury attempted to consolidate the operationalization of how sales performance is measured across both practitioners and academia ([Bolander et al., 2021](#)). SPO's, or Salesperson Performance Operationalizations, are of particular interest to this study as they help form a rational basis for this author's definition of performance. As mentioned in an earlier section of this paper, these researchers determined that outcome-based measures comprise most performance characteristics in both practice and research. For example, over 57% of respondents to their survey indicated that outcome-based measures were utilized in the practitioner realm. For the academic research

world, that number jumps to 88%. This is both important and topical. Specifically, the comparative measure of SQR or Sales to Quota ratio will be used as an independent variable in this study ([Bolander et al., 2021](#)).

Another characteristic of Bolander et al.'s study was an enumeration of other ways to measure performance. One of the key distinctions, particularly in the research realm, is the usage of primary versus secondary data in evaluating performance. This study will utilize primary data during the collection and analysis of results via a survey. Another critical feature to consider is whether the measurement is a single point in time or on repeated occasions. For the purposes of this study, this will be a single point in time analysis.

II.4.2 Defining and Measuring Intent to Remain

Turnover is a crucial factor of interest to both academic researchers and practitioners. Salesforce turnover can be particularly troublesome. Research by Robert Richardson identified that while the national average (at the time) for turnover was 12%, for sales, it was 27% ([Richardson, 1999](#)). Richardson further identified the dimensions of the cost of turnover to organizations. These were characterized as direct costs of sales losses, indirect dimensions of separation costs, replacement costs, and training expenses. Direct costs can be thought of as the decline in sales due to the salesperson's departure. Indirect expenses include expenses associated with their departure (such as severance pay if applicable). Replacement costs involve the amount it costs to hire their replacement, and training expenses account for training costs associated with the new hire ([Richardson, 1999](#)).

A 2010 paper by Fournier, Tanner Jr., Chonko, and Manolis added to the extant domain knowledge with a model based on the concept of *Propensity to Leave* ([Fournier et al., 2010](#)). Propensity to leave is a substitute measure for turnover and has been confirmed via research to

be related. The advantage of this concept versus turnover is that data collection is more accessible when the resource has not yet left the organization. Fournier et al. proposed a conceptual model that identified potential antecedents to the outcome propensity to leave. This model is shown in [Figure 11](#).

Person-career fit is related to the concept of Person-Organization Fit those forms one of the frameworks this author will use in this paper. In the model by Fournier et al., the effect of Fit is mediated by Satisfaction and Self-efficacy. The authors in this study utilized a scale introduced by Donnelly and Ivancevich in 1975 ([Donnelly Jr & Ivancevich, 1975](#)). This scale has been used extensively in sales research ([Fournier et al., 2010](#)) and will be provided in an appendix.

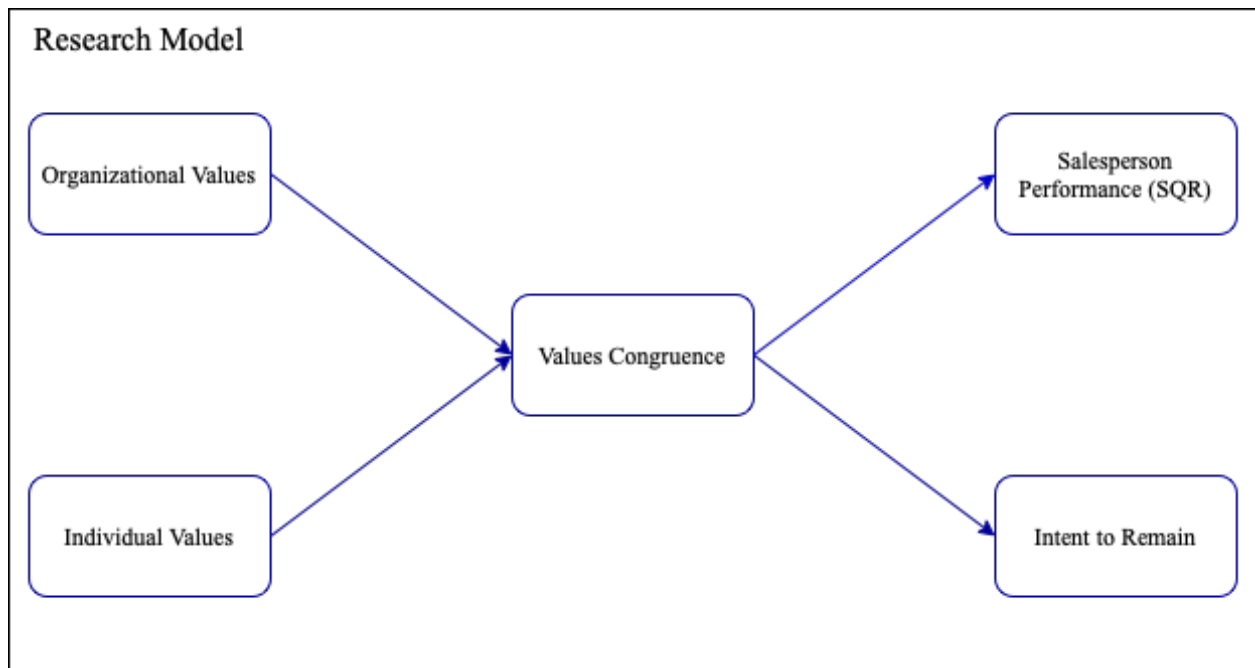
III Methodology

III.1 Research Model

The research model for this project will be an amalgam of a few previously referenced conceptual model. The basis of the research model will primarily encompass the constructs found in [Figure 4](#) and [Figure 5](#)

Figure 1

Research Model



As stated earlier, the research question for this study is: What is the impact of salesperson-organizational value congruence on individual sales performance as measured by quota attainment percentage and intention to remain scores

As shown in this model, organizational values and individual values are measured as a value congruence. There are two main predictions associated with this model that I seek to validate.

- Values congruence between an organization and an individual is positively associated with an increase in a salesperson's performance as measured by SQR (or sales to quota ratio)
- Values congruence between an organization and an individual is positively associated with an increase in a salesperson's intent to remain scores.

Note that the specific hypotheses underlying these predictions are outlined below in the

[Research Model with Hypotheses](#)

III.2 Measurements

III.2.1 Dependent Variables

The dependent variables in this study will be salesperson performance as measured by SQR or Salesperson Quota Ratio and Intention to Remain as measured via a scale defined by Donnelly and Ivancevich in 1975 ([Donnelly Jr & Ivancevich, 1975](#)).

III.2.1.1 SQR the construct of SQR falls in a broader category of measurements called Salesperson Performance Operationalizations, or SPOs. SPOs encompass a wide variety of underlying metrics and there are plentiful examples in the literature of various sorts being used effectively in both the practitioner and academic domains. In a 2021, Bolander et al conducted a survey of practitioners to catalog these holistically ([Bolander et al., 2021](#)). An example of the types of SPOs Bolander et al found can be seen in [Figure 12](#). Note that SQR is an outcome-based variable, which is a key component of this study as we are looking for the outcome of sales performance based on Values Congruence. Secondly, SQR is a comparative value. A comparative value is useful in the study context since I intend to survey sales personnel with the potential of highly varied sales targets ([Hughes, 2013](#)). The SQR variable should allow for generalization across territory size which may not be possible with raw numbers. SQR will be a

percentage value returned as part of the survey response from the questionnaire shown [here](#) .

Note that because of the Fiscal Year of the respondent organization running from June through May and the timing of the survey, I will collect information as appropriate for both the last current year SQR attainment as well as the current year-to-date SQR attainment. A higher SQR percentage will indicate better performance in a comparative sense. The formula for this dependent variable is sales revenue attainment (\$) / sales revenue quota (\$) and is expressed as a percentage. The two variables will be *SQR Full Year* and *SQR Current Year*.

III.2.1.2 Intention to Remain. Intention to Remain is a construct the I will use and is based upon a study performed by Donnelly and Ivancevich in 1975. In their paper, the authors used a construct called Propensity to Leave ([Donnelly Jr & Ivancevich, 1975](#)). Mine will merely be the inverse of this 1975 construct and the rationale for that is I believe that the Intention to Remain construct will be viewed more positively by the corporate sponsors of my data. Nonetheless, both constructs measure the same underlying concept of interest to both practitioners and academia. An example of the question that will be used is shown in the questionnaire in the [Appendix D](#), however, in simple terms, the question merely asks respondents to indicate how likely he/she is to remain at the company in Likert scale format from 1 to 5 where 1 equals Highly Unlikely and 5 equal Highly Likely. The values will be stored in a dependent variable entitled *Intention to Remain*, an ordinal value.

III.1.2 Independent Variables

The independent variable for this study will be a measure of individual and organizational value congruence. As mentioned in the literature review section of this paper, there are numerous valid ways to measure this construct. For the purposes of this study, I will use an indirect - subjective approach to measuring Values Congruence specifically as defined

and referred to earlier by ([Ostroff et al., 2005](#)). The validity of this approach is mentioned in a study by Vveinhardt and Gulbovaite ([Vveinhardt & Gulbovaite, 2017](#)). In this context, an indirect-subjective measure would be the congruence between the individual's assessment of their own values and norms and that same individual's assessment of the organization's values and norms. For this study, I will follow the guidelines and approach established by O'Reilly III et al in a 1991 paper ([O'Reilly III et al., 1991](#)). O'Reilly and the authors sought to measure person-culture fit by utilizing a set of 54 value statements in a Q-Sort methodology. In this method, the 54 items would be sorted into nine buckets ranging from most descriptive to least descriptive. Furthermore, the respondents will be forced to fill the buckets in a centrally weighted fashion. Stated another way, the buckets from most descriptive to least descriptive will be filled with the following number of items respectively: 2-4-6-9-12-9-6-4-2. This specific methodology originated with Block in 1978 paper ([Block, 1978](#)).

Two sets of measures will be gathered as part of the data collection. Firstly, the respondents will be asked to describe their individual preferences as it relates to the 54 items in the order of most preferred to least preferred bucketed as shown above. The format of the questions can be found in the [questionnaire](#). Secondly, the respondents will render their assessment of the same 54 characteristics of the firm in question in the context of most descriptive of that firm to least descriptive. Once again, these answers will be bucketed in the fashion utilized by O'Reilly III et al ([O'Reilly III et al., 1991](#)). Similarly, the format of the questions can be found linked in [Appendix C](#).

III.3.3 Control Variables

Within this study, I will use a few control variables. Firstly, I will control for the type of sales job that is being surveyed. In sales, there are typically conversion salespeople, or "hunters"

as well and account managers, or “farmers”. In general, the goals of each a slightly different. While the primary audience are front-line sales personnel with specific quotas, I will also survey managers of all levels as well. Though the latter respondents will not provide an SQR, they will contribute to the robustness of P-O fit measures and factors associated with those 54 items. I will also control for tenure of sales-related employment.

III.3 Target Subjects

The target subjects for this study will be sales personnel whether they be direct sales representatives, account managers, or management. The subject company population is a corporation and business unit that sells cloud software to businesses (B2B).

Within the company, there are approximately 2300 people in the sales function comprising both management and front-line staff. For the purposes of this study, I will focus on the General Vice President Level of Sales, which includes a total of approximately 600 sales personnel, once again comprising management and front-line staff. Many of these personnel represent the account management function. This is also referred to within sales as “farming.” From a population of 600 sales personnel, I will attempt to obtain 300 anonymized responses from front-line staff for the purposes of this study.

III.4 Data Collection

Data collection will be performed via an electronic survey. The survey will be distributed via Human Resources and/or the General Vice President of Sales. Respondents will be asked to Q-sort 54 items as described in Appendix A into 9 buckets ranging from Most Descriptive / Preferred to Least Descriptive / Preferred depending on whether the question relates to the perceived organizational preference or individual preference respectively. The 54 items will be bucketed into a centrally dominant pattern of 2-4-6-9-12-9-6-4-2 as shown in Block’s 1978 paper

on Q-sort methodology ([Block, 1978](#)).

Each respondent will be asked to provide feedback on both perceived organizational values and individual preferences. Additionally, non-PII biographical information will be collected to determine:

- Is the respondent performing as an account manager, a direct salesperson, or as a manager (which will potentially serve as a control variable)?
- The respondent (if not a manager of personnel) will be asked for whether they have been at the company since in their current function since at least June of 2020.
 - If not, these respondents will be asked to provide SQR values as of December 2021. (Encompassing June 2021 - December 2021)
 - If so, these respondents will *additionally* be asked to provide overall SQR values for the company's Fiscal Year 2020 (encompassing June 2020-May 2021)
- All Respondents will be asked to provide an intention to remain score as shown in the questionnaire in Appendix B.
- Respondents will be asked to provide additional biographical information such as. Length of career in front-line sales position irrespective of current company.

III.5 Analytical Approaches

The overall congruence of values between an individual employee's preference and their perceived value of the organization will be measured via Pearson correlation. This will comprise a construct called *Total Correlation*. A linear regression between the independent variable *Total Correlation* and the dependent variable *SQR* will be performed. An ordinal logical regression will be performed between *Total Correlation* and *Intention to Remain*.

Additionally, factor analysis will be performed on the 54 items for the Individual

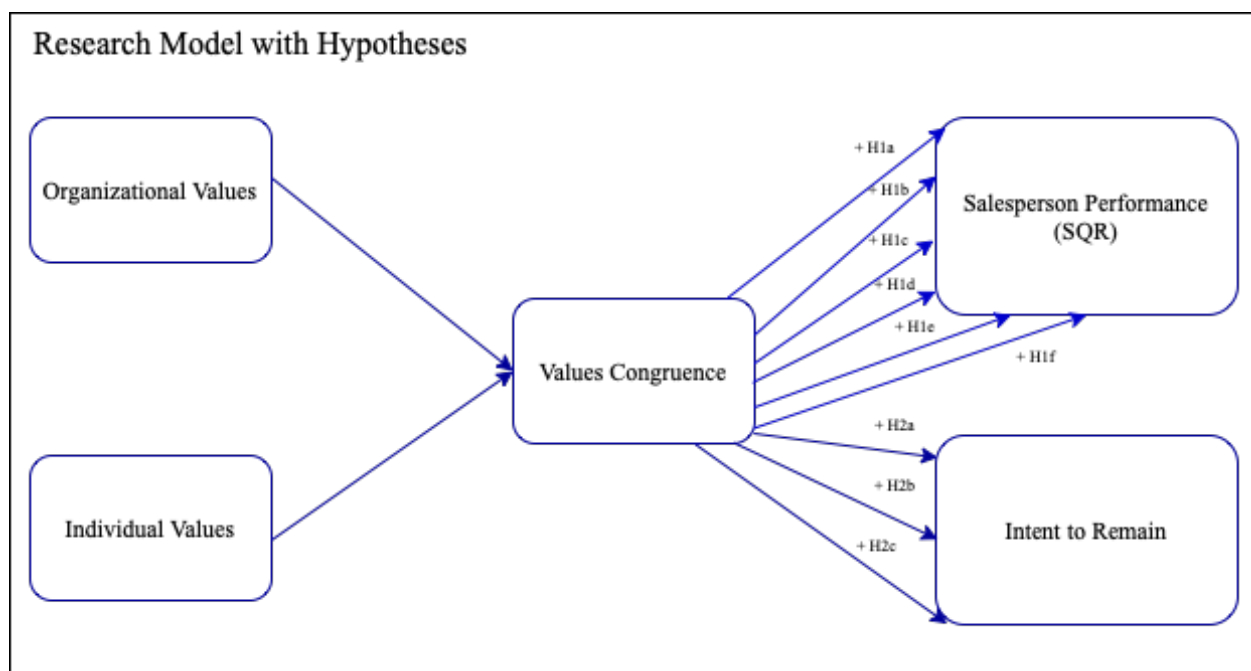
Preferences q-sort (Q-sort 1) to 1) determine if the overarching 8 key factors (Innovation, Attention to Detail, Outcome Orientation, Aggressiveness, Supportiveness, Emphasis on Rewards, Team Orientation, and Decisiveness) are appropriate and consistent with previously published works such as O'Reilly III et al ([O'Reilly III et al., 1991](#)) and 2) if these factors are not reproducible in my collected data, to attempt to identify emergent valid factors amongst the same 54 variables.

Irrespective of the results of the factor analysis, additional regression analyses will then be performed on these previously identified factors to determine the relationship to our outcome variables of interest: Sales Quota Performance (SQR) and Intent to Remain. The additional independent variable will be *Factor-Specific Congruence_{original}*. Lastly, should I uncover a distinct yet valid set factors in my data, I will perform regression analyses on the de novo factors, *Factor-Specific Congruence_{new}* as well to determine the relationship to the same outcome variables of interest mentioned above; SQR and Intent to Remain.

III.6 Hypotheses

Figure 2

Research Model with Hypotheses



The hypotheses I will be testing are as follows:

- Hypotheses related to the interaction between Total Values Congruence and SQR
 - Hypothesis 1a – An increase in *Total Congruence* is associated with an increase in *Current Year SQR* attainment
 - Hypothesis 1b – An increase in *Total Congruence* is associated with an increase in *Full Year SQR* attainment
- Hypotheses related to previously researched Congruence Factors (*Factor-Specific Congruence_{original}*) and SQR
 - Hypothesis 1c – An increase in *Factor-Specific Congruence_{original}* is associated with an increase in *Current Year SQR* attainment
 - Hypothesis 1d – An increase in *Factor-Specific Congruence_{original}* is associated with an increase in *Full Year SQR* attainment
- Hypotheses related to previously researched Congruence Factors (*Factor-Specific Congruence_{new}*)
 - Hypothesis 1e – An increase in *Factor-Specific Congruence_{new}* is associated with an increase in *Current Year SQR* attainment
 - Hypothesis 1f – An increase in *Factor-Specific Congruence_{new}* is associated with an increase in *Full Year SQR* attainment
- Hypotheses related to the interaction between Values Congruence and Intention to Remain Scores
 - Hypothesis 2A – An increase in *Total Congruence* is associated with an increase a higher *Intention to Remain* score
 - Hypothesis 2B – An increase in *Factor-Specific Congruence_{original}* is associated with an increase a higher *Intention to Remain* score

- Hypothesis 2C - An increase in *Factor-Specific Congruence_{new}* is associated with an increase a higher *Intention to Remain* score

IV Results

This research examined the impact of **Values Congruence** on two distinct, yet critical, outcomes within the sales domain. Firstly, this research inspected the relationship of **Values Congruence** with Salesperson Quota Attainment Ratio, or SQR. This was done across two distinct dependent variables representing the last full fiscal year SQR (*Full Year SQR*), comprising the period of June 2021 through May 2022, and the current fiscal year to date SQR (*Current Year SQR*) comprising the period of June 2022 through December 2022. Additionally, this research studied the relationship of **Values Congruence** with *Intention to Remain* scores. This chapter contains the results of the quantitative analysis performed on the variables and hypotheses of interest with the intention to answer the research question (RQ): What is the impact of salesperson-organization value congruence on individual sales performance as measured by quota attainment percentage and intention to remain scores?

IV.1 Preliminary Analyses

This section begins with a discussion on the population and sample data for this study along with descriptive statistics on the values of interest returned. As mentioned in a previous section, a Q-sort survey was initiated to the target population of sales personnel at a cloud based software solution provider. A total of 635 survey invites were created and sent to the entire organization reporting to the General Vice President of North American Sales. These surveys were anonymized in that neither party knew both components needed to identify the identify of any respondent. I created and was in possession of the unique survey code, but the emails were generated by administrative staff, and I had no correlation between a survey code and a respondent. As the survey collected no personally identifiable information, including the responding email address, all individual responses were anonymous to me. Similarly, neither the

administrative staff nor any company personnel had, has, or will have access to individual responses. These will be reported both here and to the company in the aggregate only. The survey was open for approximately 2 weeks, from February 15th through March 1st. Because of the nature of the online software utilized, QMethodSoftware, two distinct Q-sorts surveys were created. The first survey (Q-sort 1) collected demographic information along with a q-sort of the individual's personal preferences as it related to the 54 OCP values referenced earlier and in [Appendix C](#). These q-sorts were forced q-sorts and the individuals had to force rank the 54 values across nine buckets ranging from Least Preferable to Most Preferable with constraints on the number allowed in each bucket. The format of the buckets followed a 2-4-6-9-12-9-6-4-2 format which approximates a normal distribution. All fully filled out demographic information submitted was captured. Once submissions of demographic information were completed, the respondent was taken to the first q-sort. In the q-sort, all 54 values had to be sorted by a successful submission was recorded. Abandonment between demographic submission and Q-sort 1 was possible and did occur. All data collected was exported in csv format from QMethodSoftware and imported for use into SPSS 28.0 for Mac OS.

Total N of demographic responses was 246. There were conditional questions that removed options depending on the responses given, thus the n for specific components was < 246. Descriptives can be found below in [Table 2](#). From the 246 demographic responses, a total of 175 individual preference q-sorts (Q-sort 1) were completed. [Table 3](#) shows the breakdown of respondent types for Q-sort 1.

The individuals were then instructed to either wait for an automatic redirect or to click on a unique link that took them to the second Q-sort survey. This second survey (Q-sort 2) collected the individuals perceived values of the company along the exact same 54 value dimensions and

under the same bucket constraints; this time ranked from Least Descriptive to Most Descriptive.

All 54 values had to be allocated appropriately before submission was recorded.

Table 2

Demographic Descriptive Statistics

Role		n		Mean	Median	σ	Minimum	Maximum
		Valid ^a	Missing					
Account Manager	Total Years in Sales	187	0	9.05	7.00	7.518	1	40
	Years in Current Role	187	0	2.14	1.00	1.612	0	9
	Intention to Remain Score ^b	187	0	4.17	5.00	1.205	1	5
	Full Year SQR %	114	73	144.72	108.00	140.716	0	862
	Current Year SQR %	175	12	107.78	99.00	91.950	3	805
New Business Sales Exec.	Total Years in Sales	12	0	11.92	6.50	10.875	3	31
	Years in Current Role	12	0	3.25	3.00	1.765	1	7
	Intention to Remain Score	12	0	4.00	4.00	1.206	1	5
	Full Year SQR %	12	0	104.58	90.00	53.678	60	263
	Current Year SQR %	11	1	120.09	102.00	55.267	60	257
Personnel Manager ^c	Total Years in Sales	47	0	14.60	12.00	8.002	4	36
	Years in Current Role	47	0	3.40	2.00	3.769	0	17
	Intention to Remain Score	47	0	4.38	5.00	1.033	1	5
	Full Year SQR %	0	47					
	Current Year SQR %	0	47					

Note: $N = 635$

^a Role groups were distinct to the total valid $n = 246$

^b Intention to Remain Scores ranged from 1 to 5 where 1 = Highly Unlikely and 5 = Highly Likely

^c Personnel Manager quotas were not collected as they represent a rollout of individuals already surveyed

All unique survey codes were tracked for access and completion on both surveys. The two survey responses were stored at QMethodSoftware and accessible via a secure user portal. Only I was able to access the responses. A total of 117 valid responses were returned from the second q-sort (Q Sort 2). These are shown in [Table 4](#).

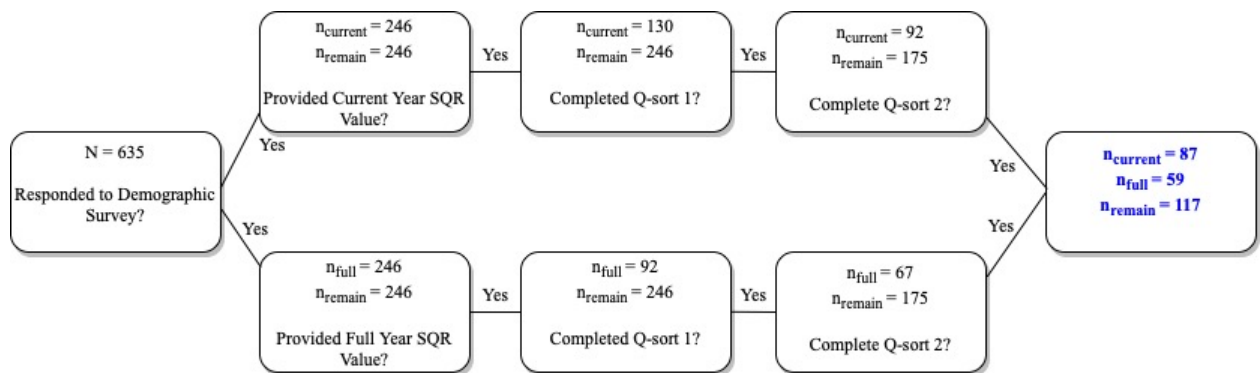
Table 3*Q-sort 1 (Personal Value Preferences) Responses by Role Category*

Participant		
Role	n	
	Valid	Missing
Account Manager	128	0
New Business Sales Exec	12	0
Personnel Manager	35	0

Table 4*Q-sort 2 (Company Value Preferences) Responses by Role Category*

Participant		
Role	n	
	Valid	Missing
Account Manager	86	0
New Business Sales Exec	7	0
Personnel Manager	24	0

As stated earlier, the total N for the survey was 635. The initial n for demographic responses was 246. All 246 demographic responses contained an *Intention to Remain* score while 130 of the responses included a *Current Year SQR* value and 67 of the responses included a *Full Year SQR* value. The combination of 127 responses including a *Current Year SQR* and the 175 valid Q-sort 1's returned reduced the total available n for the dependent variable *Current Year SQR* to 92. Similarly, the combination of 67 responses including a *Full Year SQR* and the 175 valid Q-sort 1's returned reduced the total available n for the dependent variable *Full Year SQR* to 59. When factoring in the 117 valid Q-sort 2's returned, the total number of n for *Current Year SQR* reduced to 87 and the total number of n for *Full Year SQR* reduced to 59. The flow chart of data acquisition can be seen in [Figure 3](#).

Figure 3*Response Flow Chart***IV.2 Factor Analysis**

The first step in the analysis once the data was imported into SPSS was to conduct a Factor Analysis on the Individual Values Q-sort. The intention was to validate previous research conducted by (O'Reilly III et al., 1991) who found that 8 factors from the 54 values of the OCP surveyed emerged with unique loading values of > 0.40 or < -0.40 . These values and their breakout amongst the 8 factors can be found in [Figure 13](#).

Utilizing SPSS, I conducted a Principal Component Analysis (PCA) on the results of Q-sort 1. I selected to return factors with Eigenvalues > 1 , with a subsequent Varimax rotation, and suppression of coefficients > -0.4 or < 0.4 (I chose this value based on the method employed by O'Reilly et al to replicate results). Missing cases were excluded pairwise. The initial analysis returned 21 components initially. Of the 54 initial variables, only 44 loaded onto a factor at > -0.4 or < 0.4 and the 10 that did not were removed. My second run resulted in 17 factors returned. 3 additional non-loading variables that were subsequently removed leaving me with 41. My third run resulted in 17 factors once again, but the rotated factor matrix failed to converge within 100 iterations. For my fourth run, I maintained the 41 variables but chose to explicitly extract 8 factors, once again attempting to replicate the methodology of the O'Reilly et al study.

This run left me with 32 factors that loaded < -0.4 or > 0.4 . In my fifth run, I reduced the number of factors to 7 and re-ran. Based on loadings to the rotated factor matrix, I eliminated an additional 8 variables leaving me with 24. Continuing this process for two more runs, I was left with 29 variables loaded onto 7 factors at < -0.4 or > 0.4 . 28 of the 29 loaded uniquely onto one factor. Following convention in O'Reilly et al, I suppressed the one cross-loaded value.

The Kaiser-Meyer-Olkin value for this last run was 0.588, indicating a miserable sampling size, however KMO values were above 0.5 for all values and the Bartlett's Test value was significant at $p < 0.001$. The Rotated Component Matrix and test values are shown in [Table 5](#). I was unable to replicate the prior factor components, but since a valid PCA was returned, I decided to test both sets of factor groupings against my variables of interest. These will be reported below distinctly as *Factor-Specific Congruence_{original}* and *Factor-Specific Congruence_{new}* respectively. I provided names for these factors as they are strictly distinct in makeup from previous research. There is some overlap in naming convention.

Table 5

Rotated Component Matrix_a

	Component						
	Innovative	Competitive	Fair-minded	Individualistic	People Oriented	Analytical	Relaxed
Willingness to Experiment	.729						
Risk Taking	.663						
Being Innovative	.585						
Low Level of Conflict	-.540						
Fitting in	-.530						
Being Highly Organized	-.479						
Adaptability	.438						
Being Aggressive		.645					
Opps. for Professional Growth		-.596					

Being Competitive	.513		
Working Long Hours	.487		
Respect for the Individual Rights		.633	
Fairness		.619	
Taking Initiative		-.605	
Being Results Oriented		-.491	
Flexibility			-.603
Having a Clear Guiding Phil.			.553
Being Reflective			.543
Being Different from Others			.448
Being People Oriented			.736
High pay for Good Performance			-.591
Security of Employment			-.564
Being Supportive			.525
Being Precise			.756
Paying Attention to Detail			.756
Being Analytical			.579
Being easy Going			.664
Being calm			.609
Not Constrained by many Rules			.471

Extraction Method: Principal Component Analysis.

Rotation Method: Varimax with Kaiser Normalization.

a. Rotation converged in 11 iterations.

KMO and Bartlett's Test

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.588
Bartlett's Test of Sphericity	Approx. Chi-Square	988.056
	df	406
	Sig.	<.001

IV.3 Analysis on Dependent Variable *Current Year SQR*

Current Year SQR was a self-reported quota attainment percentage by the individual respondent. As mentioned previously, only front-line personnel were asked to provide this value. Personnel managers, no matter the level, have a rolled-up quota and including this in the analyses would have confounded the results. Two primary analyses were initially planned for this dependent variable. Firstly, a linear regression comprising the input variable *Total*

Congruence as it relates to our outcome *Current Year SQR* and secondly a multiple regression comprising the 8 previously established factors *Factor-Specific Congruence_{original}* as my independent predictors of *Current Year SQR*. Given the discovery of a set of distinct valid factors within my data, I added an additional multiple regression against *Current Year SQR* utilizing *Factor-Specific Congruence_{new}*. *Total Congruence* is definitionally the same in both cases as it encompasses the correlation of all 54 factors between Q-sort 1 and Q-sort 2.

IV.3.1 Linear Regression on Current Year SQR.

An initial run of the linear regression resulted in a Durbin-Watson score of 1.574, indicating independence of residuals. Linearity was established via a scatterplot and the P-P plot showed normality. Descriptives are shown below in [Table 6](#). A review of the ANOVA values and Model Summary showed that this relationship was insignificant. Hypothesis 1a was not supported.

Table 6

Descriptives of Current Year Value and Total Correlation

	Mean	σ	N
Current Year SQR %	103.07	55.42	130
Total Correlation	.20	.17	117

IV.3.2 Multiple Regression on Current Year SQR.

IV.3.2.1 Multiple Regression on Current Year SQR by Original 8 Factors – A

multiple regression on the outcome variable of *Current Year SQR* utilizing the original 8 factors and was performed. The values of the 8 factors were the respective correlations between the variables comprising those factors between Q-sort 1 and Q-sort 2. Durbin-Watson score of 1.903, indicating independence of residuals. Linearity was established via a scatterplot and

homoscedasticity. The P-P plot showed normality. Descriptives are shown below in [Table 7](#). VIF values indicated no collinearity issues. A review of the ANOVA and Model Summary tables indicated that the overall model was not significant. These are shown in [Table 8](#). However, the Outcome Orientation Factor was significant at $p < 0.05$.

Table 7

Descriptive Statistics

	Mean	σ	N
Current Year SQR %	103.07	55.42	130
Innovation	.24	.44	117
Detail Orientation	.18	.72	90
Outcome Orientation	.39	.48	117
Aggressiveness	.32	.55	116
Supportiveness	.28	.61	117
Rewards	.39	.70	115
Team Orientation	.26	.75	112
Decisiveness	.17	.71	114

Table 8

Coefficients Table

Model	Unstandardized Coefficients		Standardized Coefficients		Sig.
	B	Std. Error	Beta	t	
1 (Constant)	88.028	9.338		9.427	<.001
Innovation	-14.273	16.930	-.114	-.843	.403
Detail Orientation	8.880	9.723	.116	.913	.365
Outcome Orientation	32.621	16.263	.285	2.006	.049
Aggressiveness	11.371	13.481	.114	.844	.402
Supportiveness	4.535	13.707	.050	.331	.742
Rewards	-7.861	10.640	-.099	-.739	.463
Team Orientation	9.234	9.716	.126	.950	.346

Decisiveness	.491	9.810	.006	.050	.960
--------------	------	-------	------	------	------

I subsequently ran a linear regression against Outcome only. After validating linearity, homoscedasticity, and normality a review of the ANOVA and Model Summary Tables indicated a statistically significant relationship at $p < 0.01$. This model explained approximately 7.9% of the variation in *Current Year SQR* in adjusted format, which is classified a medium effect by Cohen. The coefficients table is shown below in [Table 9](#). The resultant regression equation can be shown as $\text{Current Year SQR \%} = 89.80\% + (34.34\% * \text{Outcome Orientation}) + e$. Hypothesis 1c was partially supported.

Table 9

Coefficients_a

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	89.80	7.32		12.27	<.001
	Outcome Orientation	34.34	11.86	.300	2.90	.005

a. Dependent Variable: Current Year Value.

IV.3.2.2 Multiple Regression on Current Year SQR by New 7 Factors - A

multiple regression on the outcome variable of *Current Year SQR* utilizing the new 7 factors uncovered via my PCA was performed. The values of the 7 factors were the respective correlations between the variables comprising those factors between Q-sort 1 and Q-sort 2. Durbin-Watson score of 1.903, indicating independence of residuals. Linearity was established via a scatterplot and homoscedasticity. The P-P plot showed normality. Descriptives are shown below in [Table 10](#). VIF values indicated no collinearity issues. A review of the ANOVA and Model Summary tables indicated that the overall model was not significant. However, the

Individualistic Factor was significant at $p < 0.05$. This is shown in [Table 11](#).

Table 10

Descriptive Statistics

	Mean	σ	N
Current Year SQR %	103.07	55.415	130
Innovative	.26	.44	117
Competitive	.43	.58	117
Fair Minded	.24	.60	116
Individualistic	.23	.61	117
People Oriented	.19	.64	117
Analytical	.18	.72	90
Relaxed	.01	.78	110

Table 11

Coefficients^a

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	94.19	8.84		10.66	<.001
	Innovative	-18.81	16.20	-.15	-1.16	.250
	Competitive	14.82	12.40	.15	1.20	.237
	Fair Minded	7.83	11.69	.08	.67	.506
	Individualistic	23.01	11.11	.25	2.07	.043
	People Oriented	-7.18	10.80	-.08	-.67	.509
	Analytical	9.67	9.50	.13	1.02	.313
	Relaxed	-13.39	8.67	-.19	-1.54	.128

a. Dependent Variable: Current Year SQR %

I subsequently ran a linear regression against Individualistic only. After validating linearity, homoscedasticity, and normality a review of the ANOVA and Model Summary Tables indicated a statistically significant relationship at $p < 0.05$. This model explained approximately

4.7% of the variation in *Current Year SQR* in adjusted format, which is classified a small effect by Cohen. The ANOVA coefficients table are shown below in [Table 12](#). The resultant regression equation can be shown as $\text{Current Year SQR \%} = 98.04\% + (22\% * \text{Individualistic}) + e$.

Hypothesis 1c was partially supported.

Table 12

ANOVA^a

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	15,282.39	1	15,282.39	5.22	.025 ^b
	Residual	248,805.86	85	2,927.13		
	Total	264,088.25	86			

a. Dependent Variable: Current Year SQR %

b. Predictors: (Constant), Individualistic

Coefficients^a

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	98.04	6.21		15.80	<.001
	Individualistic	22.00	9.63	.24	2.29	.025

a. Dependent Variable: Current Year SQR %

IV.4 Analysis on Dependent Variable *Full Year SQR*

Full Year SQR was a self-reported quota attainment percentage by the individual respondent, this time for the previous full fiscal year. As mentioned previously, only front-line personnel were asked to provide this value. Firstly, a linear regression comprising the input variable *Total Congruence* as it relates to our outcome *Full Year SQR* and secondly a multiple regression comprising the 8 previously established factors *Factor-Specific Congruence_{original}* as my independent predictors of *Full Year SQR*. Given the discovery of a set of distinct valid factors within my data, I added an additional multiple regression against *Full Year SQR* utilizing

Factor-Specific Congruence_{new}. *Total Congruence* is definitionally the same in both cases as it encompasses the correlation of all 54 factors between Q-sort 1 and Q-sort 2.

IV.4.1 Linear Regression on Full Year SQR.

An initial run of the linear regression resulted in a Durbin-Watson score of 1.987, indicating independence of residuals. Linearity was established via a scatterplot and the P-P plot showed normality. A review of the ANOVA values and Model Summary showed that this relationship was insignificant. Hypothesis 1b was not supported.

IV.4.2 Multiple Regression on Full Year SQR.

IV.4.2.1 Multiple Regression on Full Year SQR by Original 8 Factors

A multiple regression on the outcome variable of *Full Year SQR* utilizing the original 8 factors and was performed. The values of the 8 factors were the respective correlations between the variables comprising those factors between Q-sort 1 and Q-sort 2. Durbin-Watson score of 2.48, indicating independence of residual. Linearity was established via a scatterplot and homoscedasticity. The P-P plot showed normality. VIF values indicated no collinearity issues. A review of the ANOVA and Model Summary tables indicated that the overall model was not significant. No specific factor was significant either, so no further tests were run. Hypothesis 1d was not supported by the original factors.

IV.4.2.2 Multiple Regression on Full Year SQR by New 7 Factors

A multiple regression on the outcome variable of *Current Year SQR* utilizing the new 7 factors uncovered via my PCA was performed. The values of the 7 factors were the respective correlations between the variables comprising those factors between Q-sort 1 and Q-sort 2. Durbin-Watson score of 1.706, indicating independence of residuals. Linearity was established via a scatterplot and homoscedasticity. The P-P plot showed normality. VIF values indicated no

collinearity issues. A review of the ANOVA and Model Summary tables indicated that the overall model was not significant. However, the Individualistic Factor was significant at $p < 0.10$. ANOVA and Model Summaries for this run are shown in [Table 13](#).

Table 13

ANOVA_a

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	56,838.20	7	8,119.74	1.30	.276 ^b
	Residual	250,237.91	40	6,255.95		
	Total	307,076.11	47			

a. Dependent Variable: Full Year Quota SQR %

b. Predictors: (Constant), Relaxed, People Oriented, Individualistic, Analytical, Competitive, Fair Minded, Innovative

Coefficients^a

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	119.842	15.50		7.73	<.001
	Innovative	-36.41	28.46	-.197	-1.28	.208
	Competitive	-5.53	21.78	-.039	-.25	.801
	Fair Minded	-3.60	20.53	-.027	-.18	.862
	<i>Individualistic</i>	38.53	19.52	.289	1.97	.055
	People Oriented	17.37	18.97	.138	.92	.365
	Analytical	27.80	16.69	.249	1.67	.103
	Relaxed	-14.46	15.23	-.139	-.95	.348

a. Dependent Variable: Full Year Quota SQR %

I decided to subsequently run a linear regression on Individualistic and its effect on *Full Year Quota SQR %* to see if it would be a significant predictor at $p < 0.05$. After reviewing for linearity and collinearity, the model did show significance at the desired level. The model predicted 5.1% of the variance of *Full Year Quota SQR*. Results are shown in [Table 14](#).

Hypothesis 1f is partially supported by this result. The results regression equation is Full Year

$$\text{SQR \%} = 116.20\% + (34.74\% * \text{Individualistic}) + e$$

Table 14*ANOVA_a*

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	25687.67	1	25687.67	4.15	.046 ^b
	Residual	353257.31	57	6197.50		
	Total	378944.98	58			

a. Dependent Variable: Full Year Quota SQR %

b. Predictors: (Constant), Individualistic

Coefficients^a

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	116.12	10.97		10.59	<.001
	Individualistic	34.74	17.06	.26	2.04	.046

a. Dependent Variable: Full Year Quota SQR %

IV.5 Analysis on Dependent Variable *Intent to Remain*

Intent to Remain is an ordinal value from 1 to 5 representing how likely the respondent is to remain at the company. In this scale 1 represents Highly Unlikely and 5 represents 5 Highly Likely with the gradation in-between. Because of the ordinal nature of this variable, I ran ordinal logistic regressions under the assumption of proportional odds to determine the likelihood of the various congruence variables being correlated with an increase in likelihood to remain. Where proportional odds were not shown as valid, I ran a multinomial logistic regression.

IV.5.1 Ordinal Logistic Regression on *Intent to Remain* by Total Congruence

Using SPSS once again, I ran an ordinal logistic regression on *Intent to Remain* as

my dependent variable with *Total Congruence*, a correlation across all 54 variables between Q-sort 1 and Q-sort 2, as my independent. I used Logit links. The Model fit indicated a good fit at $P < 0.01$. Necessarily, the significance of the *Total Correlation* coefficient was significant at the same level. However, the Test of Parallel lines was significant at $p < 0.01$ and therefore my assumption of proportional odds did not hold up. Model, Parameter Estimate data, and the Test of Parallel Lines results are shown below in [Table 15](#).

Table 15

Model Fitting Information

Model	-2 Log Likelihood	Chi-Square	df	Sig.
Intercept Only	252.24			
Final	233.56	18.68	1	<.001

Link function: Logit.

Parameter Estimates

		Estimate	Std. Error	Wald	df	Sig.
Threshold	[Intent to Remain = 1]	-2.23	.39	32.51	1	<.001
	[Intent to Remain = 2]	-1.37	.30	21.26	1	<.001
	[Intent to Remain = 3]	-.56	.26	4.76	1	.029
	[Intent to Remain = 4]	.28	.25	1.19	1	.275
Location	Total Correlation	2.93	.70	17.33	1	<.001

Link function: Logit.

Test of Parallel Lines^a

Model	-2 Log Likelihood	Chi-Square	df	Sig.
Null Hypothesis	233.56			
General	220.22 ^b	13.34 ^c	3	.004

The null hypothesis states that the location parameters (slope coefficients) are the same across response categories.

a. Link function: Logit.

b. The log-likelihood value cannot be further increased after maximum number of step-halving.

c. The Chi-Square statistic is computed based on the log-likelihood value of the last iteration of the general model. Validity of the test is uncertain.

To verify that I did not have proportional odds, I then ran separate binary logistic regressions on 4 dummy variables created to represent the ordinal variables. A review of the Exp(B) data across the 4 binary logistic regressions confirmed that I could not assume proportional odds.

With that now fully confirmed, I ran a multinomial logistic regression on *Intent to Remain* by Total Correlation. The model itself was a significant fit at $p < .01$. However, *Total Correlation* was only significant in predicting that respondents were more likely to respond with a 2 (Unlikely to Remain) value than with a 1 (Highly Unlikely to Remain) at an infinitesimal odds rate. Hypothesis 2a can be considered unsupported by my data.

IV.5.2 Ordinal Logistic Regression on Intent to Remain by Original 8 Factors Congruence

Next, I ran an ordinal logistic regression on Intent to Remain by the original 8 factors of congruence described earlier and operationalized as *Factor-Specific Congruence_{original}*. I used Logit links. The Model fit indicated a good fit at $P < 0.01$. Of the 8 factors, only Team Orientation was significant. However, the Test of Parallel lines was, once again, significant at $p < 0.01$ and therefore my assumption of proportional odds did not hold up. Model, Parameter Estimate data, and the Test of Parallel Lines results are shown below in [Table 16](#).

Table 16

Model Fitting Information

Model	-2 Log Likelihood	Chi-Square	df	Sig.
Intercept Only	199.49			
Final	177.86	21.63	8	.006

Link function: Logit.

Parameter estimates

		Estimate	Std. Error	Wald	df	Sig.
Threshold	[Intent to Remain = 1]	-2.37	.48	24.64	1	<.001
	[Intent to Remain = 2]	-1.67	.40	17.25	1	<.001
	[Intent to Remain = 3]	-.85	.36	5.69	1	.017
	[Intent to Remain = 4]	.19	.34	.32	1	.573
Location	Innovation	.32	.63	.26	1	.609
	Detail Orientation	-.07	.38	.04	1	.843
	Outcome Orientation	-.54	.56	.92	1	.339
	Aggressiveness	.92	.50	3.39	1	.066
	Supportiveness	-.17	.49	.12	1	.734
	Rewards	.63	.39	2.56	1	.110
	Team Orientation	.99	.33	9.31	1	.002
	Decisiveness	-.16	.34	.23	1	.632

Test of Parallel Lines^a

Model	-2 Log Likelihood	Chi-Square	df	Sig.
Null Hypothesis	177.86			
General	.000 ^b	177.86	24	<.001

The null hypothesis states that the location parameters (slope coefficients) are the same across response categories.

a. Link function: Logit.

b. The log-likelihood value is practically zero. There may be a complete separation in the data. The maximum likelihood estimates do not exist.

Next, I ran an Ordinal Regression against Team Orientation only. After validating a good model fit and passing the test of parallel lines, I ran a Generalized Linear to determine the impact that congruence in Team Orientation had. Based on data from the Parameter Estimates Table, an increase in Team Oriented Congruence was associated with an increase in the odds of *Intent to Remain*, with an odds ratio of 2.65, 95% CI [1.61.,4.37], Wald $\chi^2(1) = 14.59, p < .001$. Results are shown in [Table 17](#). Hypothesis 2b is partially supported.

Table 17*Tests of Model Effects*

Type III			
Source	Wald Chi-Square	df	Sig.
Team	14.59	1	<.001
Orientation			
Dependent Variable: Intent to Remain			
Model: (Threshold), Team Orientation			

		Hypothesis Test					
Parameter		B	Std. Error	Wald Chi-Square	df	Sig.	Exp(B)
Threshold	[Intent to Remain = 1]	-2.55	.37	46.60	1	<.001	.08
	[Intent to Remain = 2]	-1.79	.28	40.00	1	<.001	.17
	[Intent to Remain = 3]	-.98	.23	18.46	1	<.001	.38
	[Intent to Remain = 4]	-.15	.21	.49	1	.485	.87
Team Orientation		.97	.26	14.59	1	<.001	2.65
(Scale)		1 ^a					

IV.5.3 Ordinal Logistic Regression on Intent to Remain by New 7 Factors Congruence

Next, I ran an ordinal logistic regression on Intent to Remain by the new 7 factors of congruence described earlier and operationalized as *Factor-Specific Congruence_{new}*. I used Logit links. The Model was not significant. Furthermore, none of the 7 factors were significant either. No further attempts were made on this branch of analysis. Hypothesis 2c is unsupported.

IV.6 Additional Analyses

My resultant data set did not have sufficient variety of respondents between Account Management and New Business Sales Executives to attempt to control for these elements. I did have 1 variable that I did try and control for: total years in sales. To see the impact on my results when controlling for years of sales experience, I re-ran each linear or multiple regression with a hierarchical approach enter method with years of sales as my block 1.

IV6.1 Regressions on Current Year SQR

IV6.1.1 Hierarchical Regression on Current Year SQR by Total Congruence

This regression did not improve the model to a level of significance

IV6.1.2 Hierarchical Regression on Current Year SQR by Original 8 Factors

This regression did not improve the overall model to a level of significance. Team Orientation remained the only factor of significance.

IV6.1.3 Hierarchical Regression on Current Year SQR by New 7 Factors

This regression did not improve the overall model to a level of significance

IV6.2.1 Hierarchical Regression on Full Year SQR by Total Congruence

This regression did not improve the model to a level of significance

IV6.2.2 Hierarchical Regression on Full Year SQR by Original 8 Factors

This regression did not improve the overall model to a level of significance

IV6.1.3 Hierarchical Regression on Current Year SQR by New 7 Factors

This regression did not improve the overall model to a level of significance. Individualistic remained the only factor of significance.

IV.7 Summary of Hypotheses Results

Table 18

Summary of Hypotheses Results

Hypothesis	Description	Supported
H1a	An increase in <i>Total Congruence</i> is associated with an increase in <i>Current Year SQR</i> attainment	No

H1b	An increase in <i>Total Congruence</i> is associated with an increase in <i>Full Year SQR</i> attainment	No
H1c	An increase in <i>Factor-Specific Congruence_{original}</i> is associated with an increase in <i>Current Year SQR</i> attainment	Partial – Team Orientation
H1d	An increase in <i>Factor-Specific Congruence_{original}</i> is associated with an increase in <i>Full Year SQR</i> attainment	No
H1e	An increase in <i>Factor-Specific Congruence_{new}</i> is associated with an increase in <i>Current Year SQR</i> attainment	Partial – Individualistic
H1f	An increase in <i>Factor-Specific Congruence_{new}</i> is associated with an increase in <i>Full Year SQR</i> attainment	Partial – Individualistic
H2a	An increase in <i>Total Congruence</i> is associated with an increase a higher <i>Intention to Remain</i> score	No
H2b	An increase in <i>Factor-Specific Congruence_{original}</i> is associated with an increase a higher <i>Intention to Remain</i> score	Partial – Team Orientation
H2c	An increase in <i>Factor-Specific Congruence_{new}</i> is associated with an increase a higher <i>Intention to Remain</i> score	No

V Discussion

This research is intended to extend current domain knowledge on antecedents to sales performance and sales employee retention by ascertaining the impact of values congruence between an employee and his or her company. The results of this research do add to the domain by showing that there is a positive correlation between elements of values congruence and each of the outcomes of interest. In summary, while total values congruence did not show a significant relationship with either sales performance or the employee's intention to remain, key aspects or factors of the values set did predict that positive effect on both sales performance and intention to remain.

V.1 Key Findings

V.1.1 Findings on Values Congruence and factors

Previous research on Person-Organization Fit ([Chatman, 1989](#)) and extended later on by ([O'Reilly III et al., 1991](#)) built upon the concept of an Organizational Culture Profile (OCP) and attempted to ascertain its impact in a variety of ways. One of the key contributors to my work here is from O'Reilly et al, who not only identified outcomes related to this concept of congruence, but also introduced a set of latent factors that allowed a further extension to my testing. In their work from 1991, the authors found 8 factors that explained 33 of the 54 values. One of my first goals in the set of analyses I performed was an attempt to validate that the factors they identified could be replicated in the data I collected. It was of interest to me if they values would hold up thirty years later. Too, I was interested to see if a sales force in a technology company would have the same breakdown. In this research, the factors did not hold up. It would be nearly inconceivable for these to match exactly, but I found not only little overlap, but a whole host of values that were significant in my data that were not in prior research and vice-

versa. A comparison of the factors and their underlying dimensions can be found in [Table 19](#). I believe this potentially stems from two main causes. Firstly, the population of my study was employed in a very high-tech industry, and they were sales personnel whereas O'Reilly et al population were accountants. I think it fair to conjecture that the relative values of each population could be significantly different. Too, and in a broader sense, we are talking about different generations as the primary respondents of the respective studies. For example, I identified factors such as Relaxed and Fair-Minded whose constituent component values were very different than previously identified. I believe that this might represent a cultural change that has occurred since the 1990's in the workforce. Irrespective of the underlying causes, which could be interesting future research, the reality is that these differences enabled me to not only perform additional analyses but allowed me and this research to contribute in a manner I had not originally foreseen. When reviewing the factors together, there is one factor that is an exact match: Attention to Detail / Analytical. I chose a different descriptor purposefully to distinguish the entire set, however, clearly these are very highly related with even the component loadings being nearly the same. On the other end, there is no overlap with my factors of Fair Minded and Relaxed. The rest fall somewhere in between. I do have concern on the results shown in my factor People Oriented as the values seem to not belong together as they are shown. I will speak to it more in the limitations section, but I believe the power of my factor model is not strong with the relatively small sample size.

Table 19*Comparison of Factors*

Original Factors		New Factors		Comparison
Factor	Value	Factor	Value	
Innovation	<i>Stability (-)</i> _b	Innovative	Low Conflict (-)	Moderate Overlap
	Innovation (+) _a		Innovation (+)	
	Willingness to Experiment (+)		Willingness to Experiment (+)	
	Risk Taking (+)		Risk Taking (+)	
	<i>Careful (-)</i>		Fitting in (-)	
	<i>Rule Oriented (-)</i>		<i>Adaptability (+)</i>	
	Security of Employment (-)			
	Highly Organized (-)		Highly Organized (-)	
Aggressiveness	Being Aggressive (+)	Competitive	Being Aggressive (+)	Moderate Overlap
	<i>Socially Responsible (-)</i>		Opps for Professional Growth (-)	
	<i>Taking Advantage of Opps. (+)</i>		Work Long Hours (+)	
	Being Competitive (+)		Being Competitive (+)	
Attention to Detail	Being Analytical (+)	Analytical	Being Analytical (+)	Exact Match
	Attention to Detail (+)		Attention to Detail (+)	
	Precise (+)		Precise (+)	
Supportiveness	<i>Shares Information (+)</i>	People Oriented	<i>Being People Oriented (+)</i>	Little Overlap
	Supportive (+)		Supportive (+)	
	Praises Performance (+)		Praises Performance (-)	
	Work Long Hours (-)		Security of Employment (-)	
Outcome Orientation	Being Calm (-)	Individualistic	<i>Flexibility (-)</i>	No Overlap
	<i>Achievement Oriented (+)</i>		<i>Clear Guiding Philosophy (+)</i>	
	<i>Demanding (+)</i>		<i>Being Reflective (+)</i>	
	<i>High Expectations (+)</i>		<i>Being Different from Others (+)</i>	
	Results Oriented (+)			
Rewards	Opp for Professional Growth (+)	Fair Minded	<i>Respect for Individual Rights (+)</i>	No Overlap
	<i>High Pay for Good Perf. (+)</i>		<i>Fairness (+)</i>	
	Fitting in (+)		<i>Taking Initiative (-)</i>	
			Results Oriented (-)	
Team Orientation	<i>Autonomy (-)</i>	Relaxed	<i>Being easy Going (+)</i>	No Overlap
	<i>Team Oriented (+)</i>		Being calm (+)	
	<i>Collaboration (+)</i>		<i>Not Constrained by many Rules (+)</i>	
Decisiveness	<i>Predictability (+)</i>			
	<i>Decisiveness (+)</i>			
	Low Conflict (+)			

_a Bold indicates Match, _b *Italics indicates unique factor not found in other*

V.1.2 Findings on Sales Performance antecedents

Overall, I found some valid and significant results with respect to the outcome of Sales Performance as measured by SQR attainment.

V.1.2.1 Total Congruence

Total Congruence is the measure across all 54 value statements between the individual's personal preference and their perception of what the company values. Total Congruence was explicitly measured by ([O'Reilly III et al., 1991](#)) as it related to their outcomes of interest. They referred to this as the overall P-O Fit. Their outcomes were related primary to organization commitment and job satisfaction. My goal was to test this concept on sales performance outcomes. This melds the work of O'Reilly et al with ([Dubinsky et al., 1986](#)) who studied the impact of Congruence on a variety of outcomes for sales personnel specifically.

V.1.2.1.1 Total Congruence impact on Current Year SQR Attainment (H1a)

I gathered two distinct sets of data on SQR attainment. I did this to provide additional data points to work with. Current Year SQR measured the first 7 months of the company's fiscal year. In my analysis, I was unable to establish a significant relationship between Total Congruence and Current Year SQR attainment. It may be that there truly is no correlation, but my belief is that I simply did not have enough data points to properly uncover. Another intriguing possibility which could lead to future research is that it simply matters less overall for sales personnel. Hypothesis 1a was not supported.

V.1.2.1.2 Total Congruence impact on Full Year SQR Attainment (H1b)

In addition to Current Year SQR, I also collected where available, data on the last complete full year SQR attainment. This was necessarily a smaller sample set than Current Year SQR and after the results from the H1a, I fully expected to encounter the same result. I did

exactly that as I found no significant relationship between Total Congruence and Full Year SQR attainment. My suppositions from the previous section remain true here. I certainly had less power in my data than the prior and, again, it may be that sales personnel and Total Congruence simply do not have significant effects no matter the sample size. H1b was not supported.

V.1.2.2 Factor-Specific Congruence – Original Factors

Once done with Total Congruence, I sought to add to the domain on this topic by attempting to tease out whether the 8 factors initially identified by O'Reilly et al may have a significant effect on salesperson performance. I did find some correlations of significance which will be discussed below.

V.1.2.2.1 Original Factor-Specific impact on Current Year SQR Attainment

The original set of factors had not, to my knowledge, been tested for their impact as a whole or in parcels against salesperson outcomes in general. When I analyzed all 8 original factors from O'Reilly et al against Current Year SQR attainment, the model itself was not significant. However, Team Orientation was significant in the initial multiple regression. Running a subsequent linear regression with Team Orientation only, I was able to show a significant effect and model. The model was significant at $p < 0.05$ and the resultant regression equation was $\text{Current Year SQR \%} = 89.80\% + (34.34\% * \text{Outcome Orientation})$. The model had an adjusted effect size of 7.9%, which is considered a medium effect by Cohen. As you will recall from Table 18, Team Orientation is comprised of the negatively correlated value Autonomy and the positively correlated values of Team Orientation and Collaboration. This suggests that having similar values on those dimensions as an individual salesperson as your company is associated with a higher performing salesperson. Being a “Team Player” is an interesting finding. It may be that the adage of lone wolf does not apply to sales. Too, given that

most of my respondents were Account Managers (or farmers in our parlance) whose success also relies on building strong relationships, it may reinforce that teamwork and collaboration are valuable traits that go beyond a sale. This extends the academic domain by showing a relationship between an antecedent to sales success that had, to my knowledge, not been uncovered before. For practitioners, this should help inform hiring practices, particularly in the pre-screening process. I will discuss this in more detail later. H1c is partially supported in that while all 8 factors did not contribute a valid model, at least 1 did.

V.1.2.2.2 Original Factor-Specific impact on Full Year SQR Attainment

Given my success in uncovering the above significant correlation, I was hopeful that this would be confirmed as I looked at a Full Year's SQR attainment outcomes. I was unable to confirm this as my model was insignificant in predicting full year SQR attainment. I believe the primary reason for this was that my n-values were too low; a common theme in some of the results. H1d was not supported.

V.1.2.3 Factor-Specific Congruence – New Factors

Once done with the original 8 factors, I sought to add to the domain on this topic by checking whether my distinct set of new factors had a significant relationship with sales performance as measured by SQR %. I did find some correlations of significance which will be discussed below.

V.1.2.3.1 New Factor-Specific impact on Current Year SQR Attainment

When I analyzed all 7 new factors against Current Year SQR attainment, the model itself was not significant. However, the Individualistic factor was significant in the initial multiple regression. Running a subsequent linear regression with the Individualistic factor only, I was able to show a significant effect and model. The model was significant at $p < 0.05$ and the

resultant regression equation was $\text{Current Year SQR \%} = 98.04\% + (22\% * \text{Individualistic}) + e$. The model had an adjusted effect size of 4.4%, which is considered a small effect by Cohen. As you will recall from [Table 19](#), Individualistic is comprised of the negatively correlated value Flexibility and the positively correlated values of Having a Clear Guiding Philosophy, Being Reflective, and Being Different from Other. This suggests that having similar values on those dimensions as an individual salesperson as your company is associated with a higher performing salesperson. This extends the academic domain by showing a relationship between an antecedent to sales success that had, to my knowledge, not been uncovered before. For practitioners, this should help inform hiring practices, particularly in the pre-screening process. I will discuss this in more detail later. H1e is partially supported in that while all 7 factors did not contribute a valid model, at least 1 did.

V.1.2.3.2 New Factor-Specific impact on Full Year SQR Attainment

When running the same multiple regression on Full Year SQR attainment, for my new factors, I was able to uncover the same relationship shown in Current Year SQR. While my model was not significant overall, the same Individualistic factor was significant. Similarly, when running a linear regression on that factor only, I returned a significant overall model. The data shows a significant correlation between those values, in that factor, to performance attainment in the Full Year SQR attainment as well. This is particularly insightful and revealing and it strengthens the association overall. To have it show in both is promising for both the literature but also the practitioners. When taken together, this was one of the most impactful findings of this research. H1f is partially supported given that the entire model was not significant but 1 factor was. The regression equation is as follows: $\text{Full Year SQR \%} = 116.20\% + (34.74\% * \text{Individualistic}) + e$. The model was significant at $p < 0.05$ and explained 5.5% of the

variance which is considered a medium effect.

V.1.3 Findings on Sales Employee Retention antecedents

Having established that certain factors and underlying values could be significantly correlated with salesperson performance as measured by quota attainment %, I then took on what, on its face, seemed a more likely set of hypotheses to validate. However, by and large, that was not the case; at least not at a significant level.

V.1.3.1 Total Congruence impact on Intention to Remain

Running an ordinal logistic regression against Intention to Remain with Total Congruence, I fully expected to uncover a significant predictive finding. However, while appearing significant, violated the assumption of proportions. In other words, there was not a common influence of my independent variable across all 5 categories of Intent to Remain. Running a second test of several binary logistic regressions confirmed the finding. I was unable to uncover any meaningful relationship between Total Congruence and Intent to Remain. When looking at the underlying data, it is highly skewed towards the positive end of that Likert scale. While this likely shows that sales personnel enjoy being at the company, it does not directly show what I was looking for and therefore H2a was unsupported.

V.1.3.2 Original Factor-Specific impact on Intention to Remain

Interestingly, when running the ordinal logistic regression against Intent to Remain with the original 8 factors, I was able to show that, once again, Team Orientation was a significant predictor of an increasing likelihood of remaining at the company. Congruence on that factor between the employee and the company resulted in a 2.65 odds increase in being in a higher bucket than incongruence. That the same factor uncovered in the sales performance regression is revealing but perhaps less surprising. Team Orientation can often lead to a stable and content

work life, and it is perhaps an expected result. H2b was partially supported.

V.1.3.3 New Factor-Specific on Intention to Remain

I was unable to uncover the same impact when utilizing the 7 new factors as my predictors. Neither the overall model nor any specific factor was significant at $p < 0.05$. H2c was unsupported.

V.1.3 Other

As mentioned in the results section, I attempted to control for the one variable I had enough results for in my data set, years in sales. The control did not improve any of the models or underlying components.

V.2 Implications

This research contributes in several novel ways. It analyzes previously unanalyzed antecedent and outcome combinations or values congruence (P-O fit) and sales outcomes. It is also the first to look at how specific factors impact sales performance to my knowledge. Lastly, it shows that factors from the OCP profile may be different in 2022 or for certain populations.

V.2.1 Implications for Academia

Antecedents to effective sales performance and employee retention are well-studied domains. Too, but separately, P-O fit is a well-studied sub domain of the overall organizational or sociological concept of Person-Environment fit (P-E). This research in total, adds to the academic arena by ascertaining whether P-O fit or Values Congruence are antecedents to salesperson performance. This research shows that there is a significant relationship between these two concepts at some level. By connecting these two disparate domains, this research has extended to a very modest amount both sales performance and P-O fit. Too, through inclusion of employee retention in this analysis, yet another data point is added to how to better understand

what matters most.

V.2.2 Implications for Practitioners

The cost of making the wrong hire is enormous in all businesses but even more so in sales given the potential expanded impact outside of the organizations. Tools to help hire sales personnel more likely to succeed are necessary and beneficial. This research can be used by both sales management and HR to make better hires. There are many techniques used today when hiring any employee, but the value of understanding how values congruence matters or, in some cases, does not matter should help during pre-screening processes. For example, if an employer knows the corporate or business unit culture, designing pre-screening tests or surveys should allow hirers to focus in on those value aspects where alignment with the employee matters most. It is but one small tool, but every bit helps and, as a practitioner, and being part of many hiring processes, I speak from authoritative experience.

V.2.2 Managerial Implications

The hiring of a new quota-carrying front line sales executive, whether they are new business oriented, or account management focused, is a critical point of inflection for the company; particularly if the company is smaller and has less room for error. There are many tools available to these managers today. For one, in many companies the process of begins with HR consultants, either internal or external to the company. The HR specialist's job is frequently to do the initial vetting of the candidate. Primarily this consisted of talking about salary ranges, but little else. It is my contention, backed up by this research, that data can be used to reduce the number of true candidates on the front end of the process and, hopefully, the churn once he or she are onboard. One of the tools I will look to introduce within my own company as a hiring manager myself will be to screen based on values congruence. From the data I have collected, I

know there is a relationship on a few of these values that should be considered as part of the vetting process. It will comprise only one part and should not be the only decision point, but I believe it will help bring in better fits overall. My recommendation for any sales organization is to consider factors such as values congruence as a tool in the toolkit of their hiring process.

V.3 Limitations and Future Research

As with any study, there are limitations. In particular, the limitations here are both generalizability in nature and power of effect related. While this research does show significant relationships between value congruence and performance, it is not clear that this is extensible beyond sales. Too, given the specific high-tech, cloud-based nature of the respondent company, it may only apply in similar environments. Future research on whether sales performance is impacted by value congruence should look broader. A multi-industry look would help to understand what factors are universal, what factors are environment specific, and what factors do not matter at all.

The other limitation on this research has to do with depth as opposed to the breadth. My initial population to survey was 635. My target response rate was 300. My actual n values varied, but at the low end were 59 and at the high end 117. Even the upper number limited the power of my analyses. Part of this was due to survey design, which was somewhat out of my control because of a technical limitation. Nonetheless, more data respondents would have, I believe, uncovered relationships of value that simply did not appear with the limited set to a level of significance I could rely on. Future efforts here will be on ensuring an adequate sample size for a similar type of analysis. On a personal note, I already have approval to run this again next year. Not only will this allow me to collect better and more data, but it could also bring in some longitudinal aspects to this subject.

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Appendix A

Additional Figures

Figure 4

A Proposed Model of Salesforce Socialization ([Dubinsky et al., 1986](#))

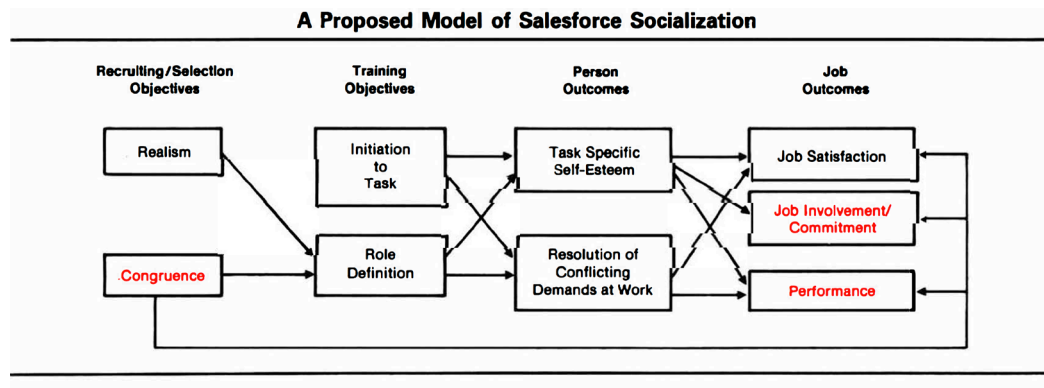


Figure 5

A model of person-organization fit ([Chatman, 1989](#))

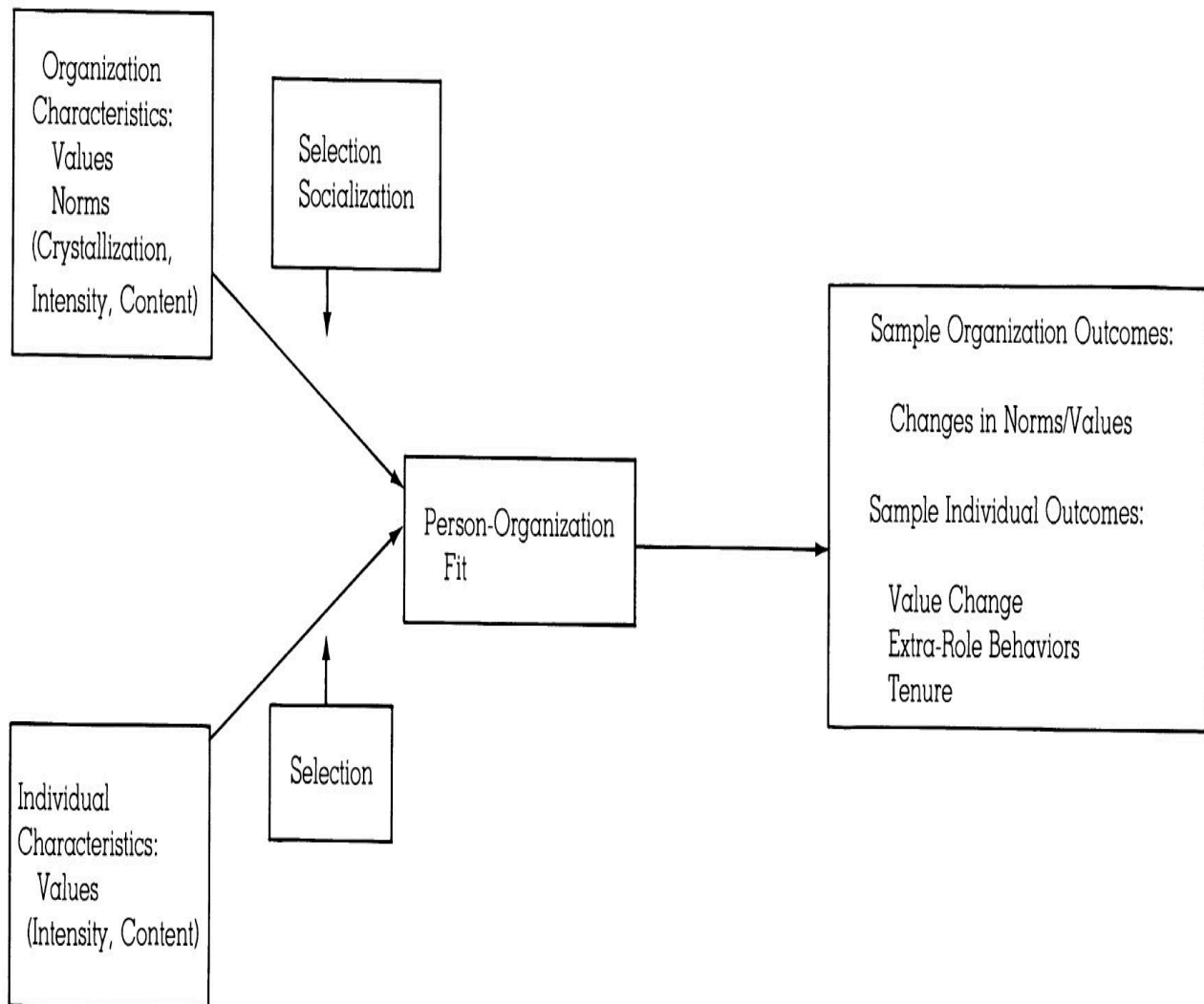


Figure 6

Socialization Correlations ([Feldman, 1976](#))

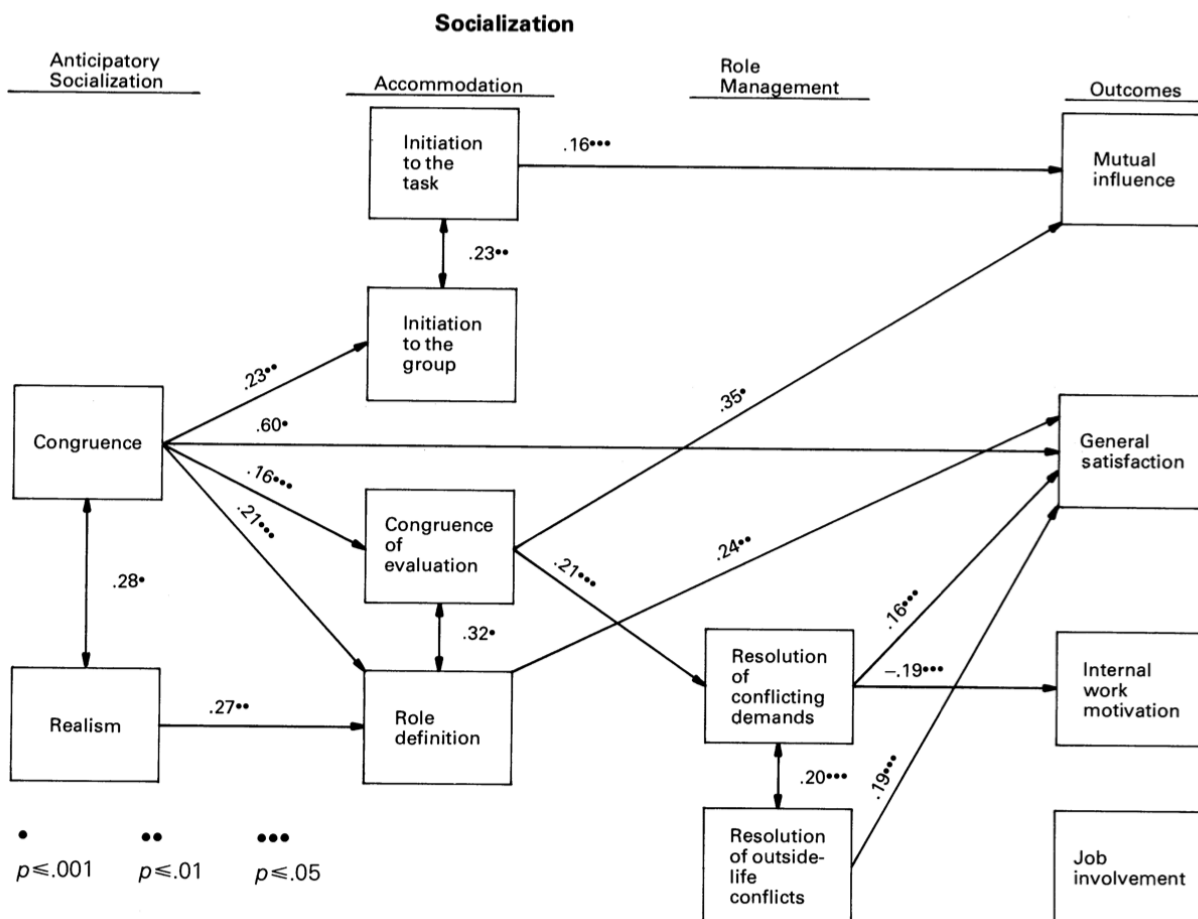


Figure 7

Summary of significant relationships in full model ([Dubinsky et al., 1986](#))

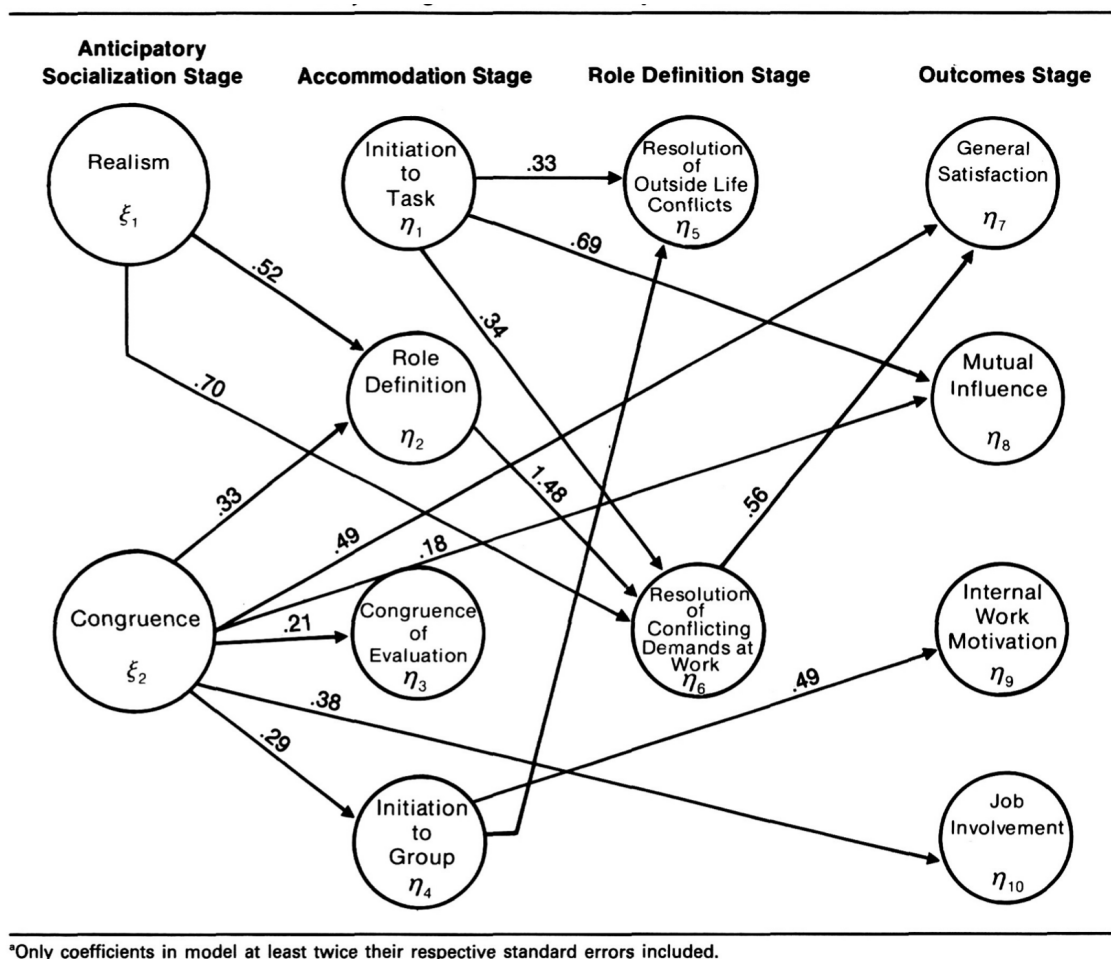
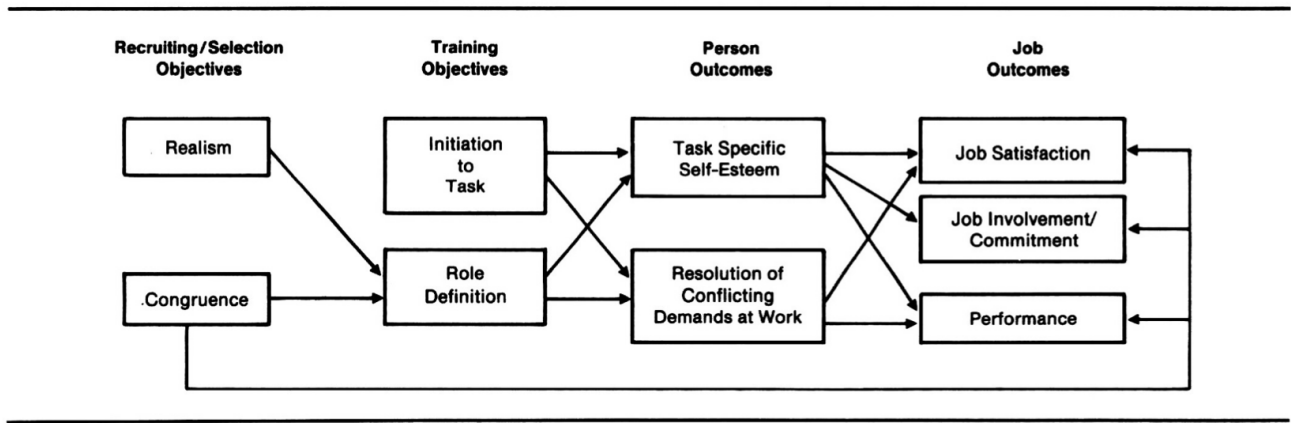


Figure 8

A proposed model of salesforce socialization ([Dubinsky et al., 1986](#))

**Figure 9**

An integrative model of person-organization fit ([Westerman & Cyr, 2004](#))

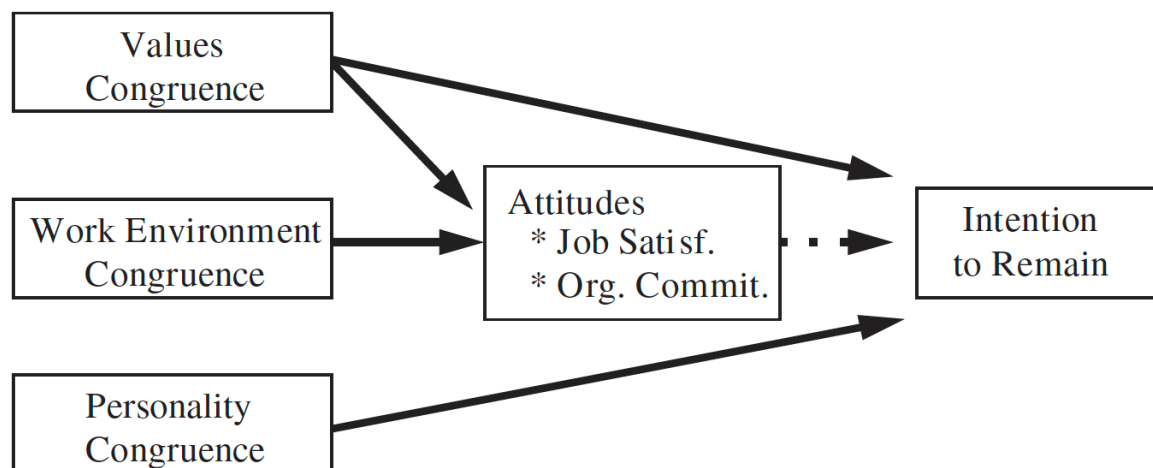


Figure 10

Typologies of value congruence ([Bao et al., 2012](#))

TYPOLOGY OF VALUE CONGRUENCE		
DIRECT	INDIRECT	
PERCEIVED	SUBJECTIVE	OBJECTIVE
<div> <div>← Person →</div> <div>← Group →</div> <div>← Organization →</div> </div>		

Figure 11

Conceptual Model ([Fournier et al., 2010](#))

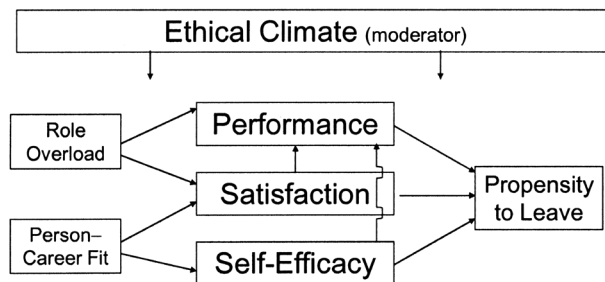


Figure 12

Conceptual model of salesperson performance operationalizations ([Bolander et al., 2021](#))

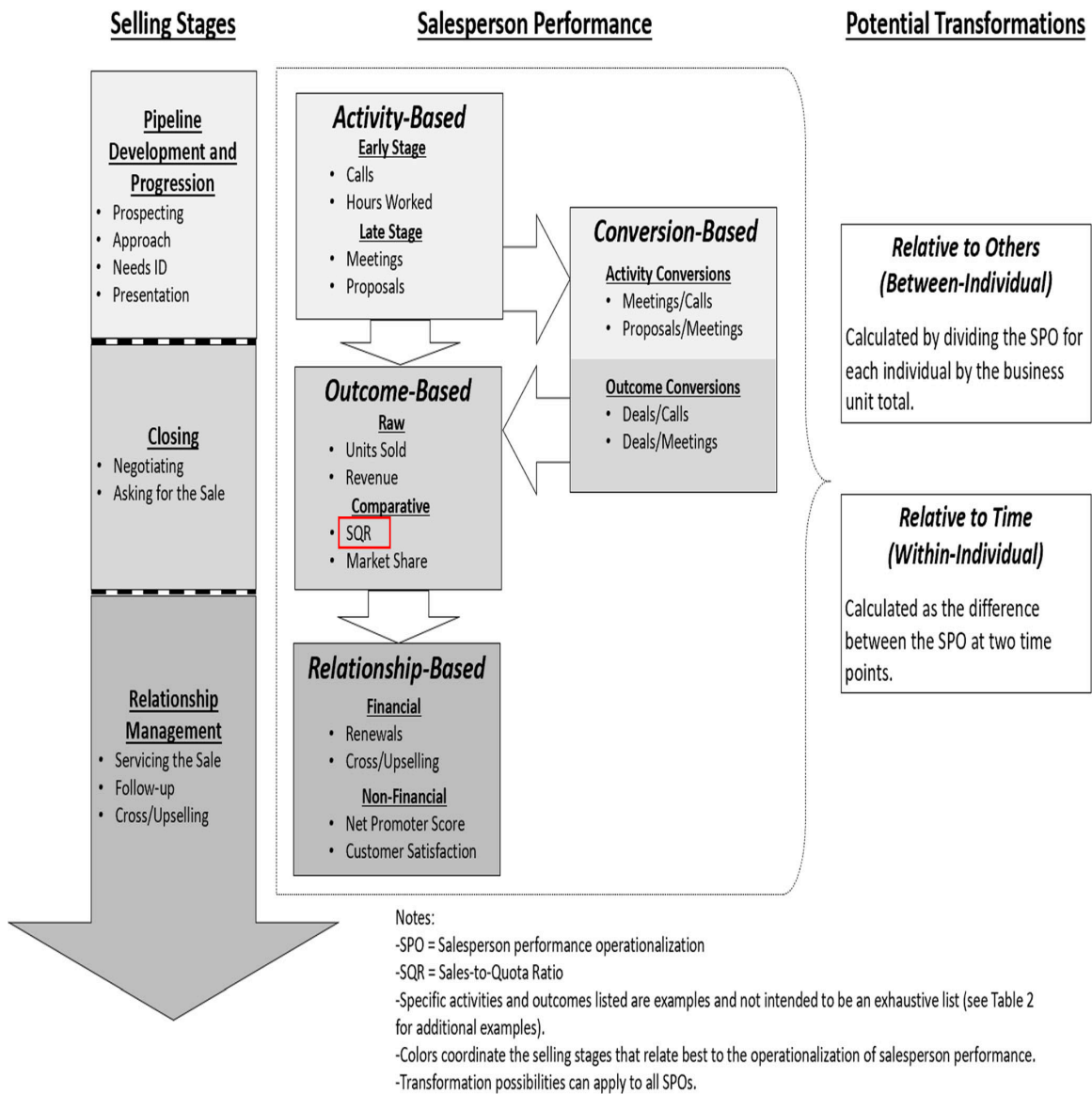


Figure 13

Component Analysis Matrix ([O'Reilly III et al., 1991](#))

TABLE 1
Results of Factor Analysis of Individual Preferences^a

Organizational Culture Profile Item	Innovation: Factor 1	Attention to Detail: Factor 2	Outcome Orientation: Factor 3	Aggressiveness: Factor 4	Supportiveness: Factor 5	Emphasis on Rewards: Factor 6	Team Orientation: Factor 7	Decisiveness: Factor 8
Stability	-.66	.04	-.25	.04	.05	-.03	-.01	.06
Innovation	.51	-.05	-.07	.07	-.02	-.02	-.09	-.05
Experimenting	.59	-.12	-.03	-.05	-.08	-.08	-.04	-.04
Risk taking	.65	-.04	-.06	.22	-.20	-.10	-.08	-.05
Careful	-.42	.33	-.25	-.11	-.15	-.07	.06	.16
Rule oriented	-.43	.38	.06	-.04	-.16	-.02	.07	.09
Security	-.53	-.24	-.30	-.06	.10	.15	-.03	.13
Highly organized	-.47	.24	-.21	-.01	-.17	-.05	-.03	-.24
Analytical	.01	.56	.13	-.09	.01	-.03	-.03	.06
Attention to detail	-.08	.75	-.05	.02	-.06	-.06	-.03	-.08
Precise	-.09	.75	.12	.01	-.09	.01	-.05	-.11
Calm	-.16	.10	-.46	.08	-.04	.04	.00	.12
Achievement oriented	-.14	-.04	.62	.08	-.00	.25	-.03	.05
Demanding	.19	-.01	.57	.21	-.15	-.15	-.07	.02
High expectations	.12	-.03	.65	.08	-.14	-.06	.01	-.03
Results oriented	.07	-.01	.49	-.15	-.18	.20	.05	-.14
Opportunities	.17	.01	-.08	.55	-.05	.25	.04	-.10

TABLE 1 (continued)

Organizational Culture Profile Item	Innovation: Factor 1	Attention to Detail: Factor 2	Outcome Orientation: Factor 3	Aggressiveness: Factor 4	Supportiveness: Factor 5	Emphasis on Rewards: Factor 6	Team Orientation: Factor 7	Decisiveness: Factor 8
Aggressive	.09	-.08	.13	.75	-.11	-.09	-.12	-.14
Socially responsible	.11	-.19	-.06	-.51	-.09	-.28	-.05	.06
Competitive	.00	-.09	.18	.55	-.40	.00	-.13	.04
Shares information	.30	-.08	-.00	-.12	.44	-.01	.21	.24
Supportive	-.08	.03	-.21	-.08	.63	-.03	.14	.09
Praises performance	-.19	-.11	-.06	.00	.54	.10	-.13	.07
Long hours	-.01	.21	.14	.20	-.53	.02	.12	.16
Professional growth	-.08	-.05	-.08	.12	-.15	.68	.03	.03
High pay for performance	.07	-.08	.14	.03	.16	.66	-.20	.06
Fitting in	-.23	-.02	.00	-.09	.17	.41	.03	.21
Autonomy	.19	-.02	-.04	-.27	-.21	-.00	-.45	-.07
Team oriented	-.10	.02	-.06	.01	.07	.03	.75	.03
Collaboration	.04	-.09	.01	-.19	-.12	-.12	.70	.03
Predictability	-.33	.22	-.03	.04	.03	-.00	.02	.44
Decisiveness	-.03	.10	-.02	.09	-.04	-.06	-.15	.65
Low conflict	-.26	-.20	-.25	-.15	.09	.09	-.09	.56
Eigenvalues	5.28	4.16	3.11	2.33	1.93	1.73	1.61	1.49
Proportion of variance accounted for	.10	.08	.06	.04	.04	.03	.03	.03

^a N = 395. Boldface statistics represent loadings greater than .40 on that factor.

Appendix B

Additional Tables

Table 20

Overview of drivers of sales performance (Verbeke et al., 2011)

Predictor	Number of raw effects	Total N	Simple average r^a	Average r adjusted for reliability	Reliability-adjusted sample-weighted average r^b	Z-value	95% Confidence interval		File drawer N^c	Q statistic for homogeneity test ^d
							Lower bound	Upper bound		
Role Perceptions										
Role Conflict	57	12750	-.11	-.14	-.15	-1.12	-.39	.11	n.a.	18.7*
Role Ambiguity	113	27832	-.21*	-.29*	-.25*	-1.99	-.57	-.01	249	228.6*
Role Overload	22	4582	.02	.02	.07	.11	-.37	.42	n.a.	181.3*
Burnout	39	8709	-.15	-.20	-.12	-1.13	-.56	.15	n.a.	33.8*
Aptitude										
Dispositional Traits	125	27445	.07	.08	.06	.41	-.31	.48	n.a.	3578.9*
Personal Concerns	34	8476	.11	.15	.20	.92	-.16	.45	n.a.	256.1*
Identity	109	26489	.14	.16	.13	.75	-.26	.57	n.a.	2505.1*
Cognitive	12	1928	.18*	.24*	.23*	2.04	.01	.45	3	209.3*
Skill Level										
Interpersonal	201	42615	.21	.27	.24	1.37	-.12	.65	n.a.	9641.3*
Degree of Adaptiveness	71	14547	.26*	.29*	.27*	1.95	.00	.59	14	412.4*
Selling-Related Knowledge	122	29910	.26*	.33*	.28*	1.92	-.01	.67	20	2256.4*
Motivation										
Cognitive Choice	102	22989	.15	.19	.20	.92	-.21	.59	n.a.	1764.9*
Goal Orientation	129	26460	.18	.23	.21	1.58	-.07	.53	n.a.	1245.5*
Work Engagement	110	25238	.24	.28	.23	1.42	-.11	.67	n.a.	1133.6*
Personal										
Biographical	190	44948	.10	.12	.12	.69	-.21	.45	n.a.	7549.1*
Organizational & Environmental										
External Environment	110	19506	.17	.20	.12	1.02	-.18	.59	n.a.	945.7*
Internal Environment	255	69625	.15	.19	.16	1.04	-.17	.54	n.a.	9357.6*
Supervisory Leadership	242	49204	.17	.20	.17	1.15	-.14	.54	n.a.	2920.4*

* $p < .05$

^a Unadjusted for artifacts and not weighted for sample size.

^b Reliability adjustments are based on individual study reliabilities. In those cases where this data was not available, it is based on the reliability distribution.

^c The *file drawer N* represents the number of unlocated studies with null results needed to reduce the cumulated effect across studies to the point of non-significance ($p \geq .05$). In this column, "n.a." refers to the corresponding non-significant mean r , which makes it unnecessary to estimate a *file drawer N*.

^d The *Q*-statistic is used to test for homogeneity in the true correlations within each category.

Appendix C

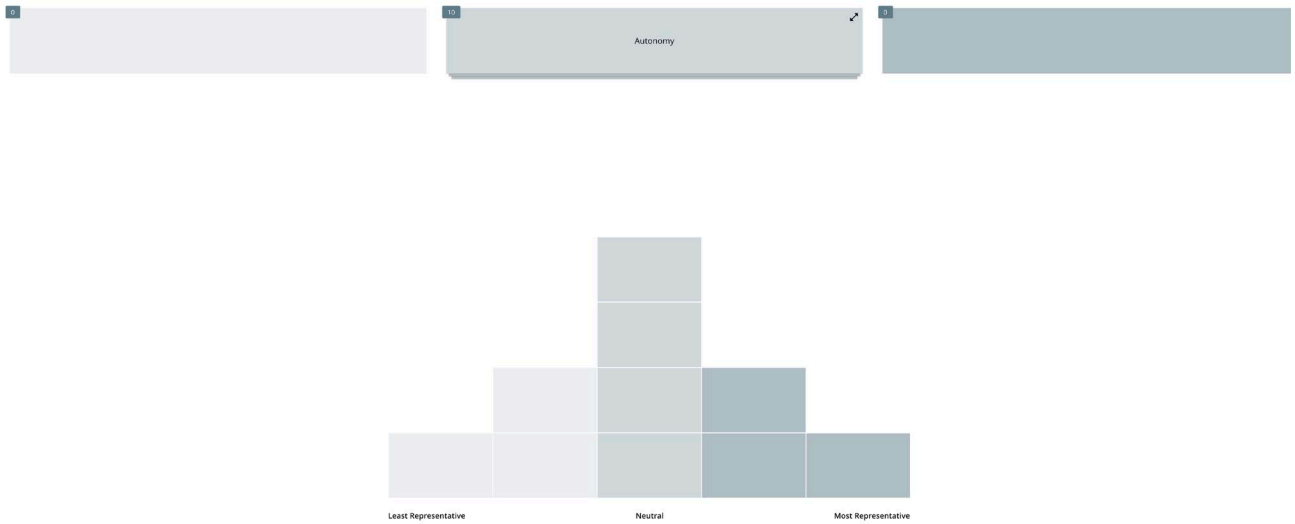
OCP Item Set

Organizational Culture Profile Item Set

- | | |
|--|--|
| 1. Flexibility | 27. Decisiveness |
| 2. Adaptability | 28. Action orientation |
| 3. Stability | 29. Taking initiative |
| 4. Predictability | 30. Being reflective |
| 5. Being innovative | 31. Achievement orientation |
| 6. Being quick to take advantage of opportunities | 32. Being demanding |
| 7. A willingness to experiment | 33. Taking individual responsibility |
| 8. Risk taking | 34. Having high expectations for performance |
| 9. Being careful | 35. Opportunities for professional growth |
| 10. Autonomy | 36. High pay for good performance |
| 11. Being rule oriented | 37. Security of employment |
| 12. Being analytical | 38. Offers praise for good performance |
| 13. Paying attention to detail | 39. Low level of conflict |
| 14. Being precise | 40. Confronting conflict directly |
| 15. Being team oriented | 41. Developing friends at work |
| 16. Sharing information freely | 42. Fitting in |
| 17. Emphasizing a single culture throughout the organization | 43. Working in collaboration with others |
| 18. Being people oriented | 44. Enthusiasm for the job |
| 19. Fairness | 45. Working long hours |
| 20. Respect for the individual's right | 46. Not being constrained by many rules |
| 21. Tolerance | 47. An emphasis on quality |
| 22. Informality | 48. Being distinctive-different from others |
| 23. Being easy going | 49. Having a good reputation |
| 24. Being calm | 50. Being socially responsible |
| 25. Being supportive | 51. Being results oriented |
| 26. Being aggressive | 52. Having a clear guiding philosophy |
| | 53. Being competitive |
| | 54. Being highly organized |

Appendix D
Survey Questionnaire

- 1) **When did you begin your current position at <company> <Calendar Field>**
 - ***Note if survey response is before June 1, 2020, respondent will be shown additional response field below:**
- 2) **Please provide your Fiscal Year 2020 (June 2020-May 2021) overall attainment percentage (measured as overall sales ARR (annual recurring revenue) total / Annual ARR Quota Total?**
- 3) **As of December 2021, what is your current overall attainment percentage (measured as overall sales ARR year-to-date (year-to-date recurring revenue) total / Year-to-date ARR Quota?**
- 4) **How many years and month have you been in a front-line sales position? <Years> + <months>**
- 5) **Are you currently working in account management or new sales? <Radio button>**
- 6) **Please sort the following items from most descriptive / preferred to least descriptive / preferred (note, there will be 9 categories in actual survey)**



6) How likely are you to remain at your current company? Please choose one of the

following responses:

- Highly Unlikely
- Somewhat Unlikely
- Neutral
- Somewhat Likely
- Highly Likely