
24 Boundary work and customer connectivity in B2B front lines

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To build long-term customer relationships, salespeople play a critical boundary-spanning role that can be an inimitable source of competitive strength (Cannon and Perreault 1999; Doney and Cannon 1997; Rackham and DeVincentis 1998; Weitz and Bradford 1999). A key characteristic of such roles is the boundary work¹ that salespeople perform to develop strategies and tactics to manage their interfaces with customers (Adams 1976; Brown 1990; McFarland et al., 2006; Soldow and Thomas 1984; Solomon et al. 1985; Spiro and Weitz 1990). Recent studies suggest that new realities are reconfiguring and redefining boundary work in the front lines of B2B interfaces. For example, Hunter and Perreault (2007) focus on salespeople's relationship-forging tasks or tactics that 'blur' boundaries by building strong relationships. Grayson (2007) finds that salespeople must enact divergent boundary roles of 'friends' and 'businesspeople' and manage the inherent conflict between them to build effective relationships. Likewise, in reviewing the evolution of sales roles in B2B contexts, Bradford et al. (2010, p. 241) observe that an embedded sales role emerges in which a salesperson's effectiveness depends on functionally integrating 'organizational subunits' with 'customer's subunits' to create customized solutions.

These recent studies underscore Heide and Wathne's (2006, p. 85) assessment that boundary work raises 'practical barriers' to developing customer relationships and that many 'firms frequently fail in these efforts'. Consistent with this, Evans et al. (1998, p. 32) note that 'considerable development' of a theory of boundary work is needed for 'successful relationship sales strategies'.

The purpose of this chapter is to motivate development of boundary role theory that responds to emerging realities of boundary work and stimulates an organizing framework to germinate new directions for theory and practice. Specifically, the chapter's objectives are twofold. First, we provide a focused review of the boundary role research in B2B contexts. In doing so, we outline its key theoretical principles and critically assess prior empirical work. Our review reveals that boundary role theory has received widespread attention in the literature but also that most studies are guided by a tactical rather than strategic focus. Second, we describe features of boundary work that demand a strategic perspective and rethinking of the premises of contemporary boundary role theory. In particular, we focus on customer-, competitor- and organization-driven forces that are dramatically shifting the nature and scope of boundary work (Bradford et al. 2010; Davie et al., 2010; Jones et al. 2005).

To develop the implications of these forces, we use the rhetorical device of a myth-reality framework to highlight five specific challenges to contemporary boundary role theory. Although contrasting myths of contemporary role theory with evolving realities of boundary work risks exaggeration of differences, it is constructive for provoking

theory development and new research directions. We recognize that useful theories, as boundary role theory certainly is, are rarely static and cast in stone; rather, they evolve with the phenomena they represent, and certain principles derived from them may enable a useful rhetorical contrast. In this sense, our myth–reality framework should be viewed as a device for sharpening differences to motivate a discontinuous shift in the evolution of boundary role theory. Specifically, we develop five lines of myth–reality differences and build on them to suggest fresh approaches to boundary role theory in B2B marketing. We begin with a review of relevant literature.

BOUNDARY ROLE THEORY IN B2B FRONT LINES: ORIGINS AND REVIEW

Role theory has emerged as one of the most prominent paradigms for understanding sales performance and other frontline capabilities, in part because it develops coherent role identities from the integration of performative and social role dimensions (that is, it portrays roles as enacted specifically with respect to particular relational partners; e.g. Belasco 1966; Biddle 1986; Burke and Reitzes 1981; Sarbin and Allen 1968; Solomon et al. 1985). Role theory asserts that salespeople, using mastery over a wide range of routines, scripts and associated behaviors (Leigh and McGraw 1989), enact a coherent set of behaviors and activities that are recognizable markers of prototypical, easily categorized role identities (Arnett et al., 2003; Elsbach 2004; Fiske and Taylor 1991). For example, successful enactment of a prototypical identity (e.g. ‘friend’) validates and confirms a salesperson’s standing in the customer’s mind as someone who can be trusted to collaborate constructively. In addition, salespeople’s enactment of a prototypical identity (e.g. ‘friend’) invokes socially coded scripts that allow customers to infer the unspoken norms and expectations that guide interactions toward desired outcomes (e.g. mutual cooperation and commitment; Solomon et al. 1985).

Building on microsociological notions of rituals, codes and artifacts in symbolic interactionism (Sarbin and Allen 1968), much research in marketing has conceived of roles as a useful unit of analysis for understanding a wide range of boundary work phenomena in B2B contexts. For example, Dudley and Narayandas (2006) discuss Hewlett-Packard’s selling and training approach as being built around the roles of ‘value-added supplier’ (with focus on specialized services and knowledge) and ‘trusted advisor’ (with focus on total solutions), which salespeople are trained to enact with customers.

Empirical work on role theory in marketing has roots in Belasco’s (1966) early observations of a salesperson’s role demands. Rizzo et al.’s (1970) development of validated scales to measure role conflict and ambiguity provided a boost to boundary role work in marketing. By the mid-1990s, Brown and Peterson (1993) were able to quantitatively review 59 studies that focused specifically on salesperson role conflict and ambiguity in relation to performance and job satisfaction. Applications of boundary role theory are now evident in research involving a wide range of boundary-spanning contexts, including customer service employees, buyers, retail managers, product managers and account managers, in addition to salespeople, who remain the most studied group. Thus,

although early studies of boundary roles focused on salesperson roles, the underlying theory has been enriched and empirical generalizations achieved by application to a diversity of frontline roles.

Providing a comprehensive review of the vast body of work on boundary roles in marketing is virtually impossible within the confines of a chapter and is beyond the scope of our current effort (for a recent review, see Singh and Saatcioglu 2008). Our purpose is to present the key themes and approaches that typify boundary role theory applications in marketing. Accordingly, we identified a sampling of key articles published between 1990 and 2010 in five major marketing journals (*Journal of Marketing*, *Journal of Marketing Research*, *Journal of Retailing*, *Journal of the Academy of Marketing Science* and *Journal of Business Research*) using the search words 'boundary', 'role' and 'theory'.² We reviewed each article identified as a candidate for inclusion to ensure that the reported study: (1) used some aspect of boundary role theory; (2) had empirical content; and (3) did not use the same data as another included study. In addition, consistent with the focus of this handbook, we generally preferred articles for inclusion that involved B2B contexts. We summarized studies that met these criteria by identifying the role theory concepts used, role theory hypotheses, sample type and key findings. Table 24.1 provides an abbreviated version of our review. Space limitations do not permit inclusion of a full version, which is available in a web appendix (see <http://handbook.isbm.org>).

Although a review of Table 24.1 confirms the widespread application of boundary role theory in diverse marketing contexts, in general empirical research has focused on boundary *roles*, paying little attention to the underlying boundary *strategy* they are designed to support or to the specific role *behaviors* that are required to support different roles. As a result, much of what is known about marketing boundary roles is tactical (e.g. how to enhance salesperson performance) and predominantly rooted in theoretical paradigms of control, coping and constraint (e.g. how to control salesperson behavior and effort, how to facilitate salesperson coping with role stress, how role stress constrains salesperson performance). Largely absent from the literature are studies that focus on strategic issues related to organizational front lines, such as salespeople's role in shaping firm boundaries (e.g. maintain or blur them), sustaining competitive advantages (e.g. innovate organizational systems for customer value creation) and learning from market interactions (e.g. new knowledge is generated at customer interfaces).

Such a view of the nature and limits of roles is problematic because it is based on past realities that in today's markets may be more myth than fact. Three forces combine to reconfigure and redefine boundary work at B2B interfaces. First, dissatisfied with homogeneous products and services for their heterogeneous needs and wants, customers increasingly demand customization in boundary interactions. Customization is essentially a boundary problem, the solution to which lies in the dynamics of boundary interactions. To customize, organizations need to incorporate the specific needs and wants of individual customers, as revealed in past or current boundary interactions. Some customers may desire an arm's-length (acquaintance) relationship characterized by clearly defined boundaries, whereas others may prefer a close (friend) relationship that blurs organizational boundaries. Moreover, customer needs for customization may change dynamically over time. In response, organizations have shifted attention from

Table 24.1 Selected review of the literature on boundary role theory in marketing

Authors	Role Theory Concepts	Role Theory Hypotheses	Sample	Findings
Crosby, Evans and Cowles (1990)	Relational Quality	Relationship quality, defined by similarity, domain expertise and role behaviors, affects salesperson's effectiveness.	469 randomly selected life insurance policy holders; 25 to 44 years age group.	Relational role behaviors are the strongest predictor of relationship quality; however, relationship quality is not associated with effectiveness.
Lusch and Serpkenci (1990)	Role Stress Theory and Individual Differences	Self-esteem, achievement orientation, and inner-direction are negatively associated with job tension and positively with job satisfaction. Job tension diminished performance and satisfaction.	182 retail store managers	Job tension significantly impairs performance, and substantially reduces satisfaction. Managers with higher achievement orientation and inner directedness experience lower tension.
Singh and Rhoads (1991)	Role Ambiguity	Boundary spanner's role ambiguity has multidimensional facets (e.g. company, boss, customers) that relate differentially with job outcomes (e.g. performance, satisfaction)	472 US-based members of the Sales and Marketing Executives association. 216 boundary spanners (sales and service) from divisions of a US-based Fortune 500 industrial manufacturer.	Job satisfaction is affected more strongly by company and boss role ambiguity, while job performance is influenced more strongly by customer ambiguity. Global measures of role ambiguity underidentify the ambiguity experienced by boundary spanners.
Brown and Peterson (1994)	Role Stress and Effort	Role stressors diminish effort, while competitiveness and instrumentality enhance it. In turn, effort directly and indirectly influences job satisfaction.	380 US-based sales people involved in door-to-door selling of durable products.	Role conflict, but not role ambiguity, reduces effort. Effort has a direct rather than indirect effect on satisfaction and performance.

Challagalla and shervani (1996)	Role Stress (e.g. customer role ambiguity) and Control (e.g. information, reward) Theories	Output, activity and capability controls reduce the level of role ambiguity; which subsequently has a negative effect on satisfaction and performance.	270 salespeople from five industrial product divisions of two Fortune 500 companies.	Information-based controls consistently diminish supervisor and customer role ambiguity, while punishments have mixed effects. Reward controls have marginal influence on role ambiguity. Customer role ambiguity is more detrimental for performance, while supervisor role ambiguity is more significant for reducing satisfaction.
Hartline and Ferrell (1996)	Role Stress Theory; Employee-Role Interface	Role ambiguity and conflict negatively influence customers' service quality evaluations; this effect is mediated by self-efficacy, job satisfaction, and adaptability.	561 customer contact employees in the hotel industry.	Role ambiguity has significant negative effects, as proposed; whereas role conflict does not. Role conflict is positively influenced by empowerment and increases self-efficacy.
MacKenzie, Podsakoff and Ahearne (1998)	Role Theory; Distinguishing In-role and Extra-role Performance	Role ambiguity and conflict negatively influence in-role performance. In-role performance positively affects organizational commitment and satisfaction, both of which enhance extra-role performance.	672 commission salespeople from a large insurance company.	As proposed, role ambiguity and conflict diminish in-role performance. In addition, role ambiguity and conflict directly and negatively affect commitment and satisfaction. Weak results obtained for extra-role performance.
Singh (1998)	Role Stress Theory	Role stressors (role ambiguity, conflict and overload) and job characteristics (feedback, autonomy have an inverted U-relationship with job performance). Job characteristics such as feedback, autonomy also have an inverted U-relationship.	Sample 1: 1850 members of Sales and Marketing Executives (SME) association Sample 2: 520 sales and marketing professionals Fortune 500 MNCs.	Inverted U-effects are generally not supported. Significant linear effects and interaction effects between role stressors and job characteristics are obtained.

Table 24.1 (continued)

Authors	Role Theory Concepts	Role Theory Hypotheses	Sample	Findings
Flaherty, Dahlstrom and Skinner (1999)	Role Stress Theory	Discrepancy in salesperson's perceived and desired organizational customer orientation influences role conflict and ambiguity. Role variables negatively affect customer-oriented selling performance.	402 salespeople from various firms.	Both role ambiguity and conflict are amplified by customer orientation discrepancy. Only role ambiguity substantially constrains customer-oriented selling performance.
Shoemaker (1999)	Salesperson Role and Leadership Practices Model	Evolving salesperson role focuses on five practices: (1) Challenging the Process, (2) Inspiring a Shared Vision, (3) Enabling Others to Act, (4) Modeling the Way and (5) Encouraging the Heart which are positively related to salesperson role clarity and job satisfaction.	158 salespeople from an electrical/electronic control component manufacturer.	Leadership role practices are positively associated with job satisfaction. No significant relationship among leadership practices and self-efficacy were found. With one exception, leadership role practices are positively associated with role clarity.
Atuahene-Grima and Li (2002)	Role Stress (e.g., ambiguity) and Control (e.g., process, outcome) Theories	Role ambiguity diminishes supervisee trust, and this negative effect is stronger in China than in the US.	Chinese sample consisted of 157 onsite interviews from salespersons located in Beijing's High Technology Experimental Zone. US sample frame consisted of 190 salespeople who worked in manufacturing firms.	Role ambiguity interacts with supervisee trust to enhance sales performance in the Chinese sample; in contrast US sample shows a marginally negative interaction effect.

Jong, Ruyter and Lemmink (2004)	Role Diversity, Role Stress, Inter-role Behavior	Tolerance for self-management and flexibility of team members positively affect employees' perceptions of the Self-Managing Teams (SMT) service climate.	Multi-source data comprising: (1) a longitudinal study of 61 SMT members yielding 939 survey responses at time 1 and 730 responses at time 2, and (2) 1884 customer surveys.	Tolerance for self-management, flexibility, and inter- and intrateam support have a direct, positive impact on individual employees' service-climate perceptions. SMT service climate perceptions have a positive impact on customer perceived service quality and share of customer and a negative effect on sales productivity.
Bhuiyan, Mengüç and Borsboom (2005)	Role Stress Theory	Role ambiguity and conflict have nonlinear effects on job performance, job satisfaction, life satisfaction and turnover intentions. The nonlinear effects include inverted-U and triphasic relationships.	203 salespersons and their sales managers representing 11 industrial companies in New Zealand.	Mixed support for non-linear effects, although the effects are unequivocally dysfunctional (e.g., negative for job satisfaction).
Ferguson, Paulin and Barger (2005)	Contractual and Relational Governance of Boundary Spanners.	Boundary spanner closeness to the client company is positively related to the use of relational versus contractual governance in the exchange and greater exchange performance.	60 business clients and their account managers at seven commercial banks in three countries.	In regard to exchange performance, relational governance is more predominant than contractual mechanism than contractual governance. Also closeness between boundary spanner and the client company positively affects exchange performance.

Table 24.1 (continued)

Authors	Role Theory Concepts	Role Theory Hypotheses	Sample	Findings
Harris, Artis, Walters and Licata (2006)	Resourcefulness and Stressors in Customer Service Roles	Role ambiguity and role conflict are negatively associated with resourcefulness. Customer orientation mediates the effect of resourcefulness on job satisfaction.	140 employees of a large bank in Southeastern US.	Role stressors constrain the resourcefulness of service employees, and act as an countervailing force against the: (1) positive effects of resourcefulness on job satisfaction and (2) negative effects of resourcefulness on intentions to turnover.
Karatepe, Yavas, Babakus and Avci (2006)	Role stress, role ambiguity and self efficacy, role conflict and job satisfaction	The negative relationship between: (1) role ambiguity and self-efficacy, (2) role conflict and self efficacy, (3) role ambiguity and job satisfaction, and (4) role conflict and job satisfaction is stronger for frontline female employees than male employees.	362 usable surveys from frontline employees working in 21 banks in the Turkish Republic of Northern Cyprus.	Role conflict has a significantly stronger impact on females' job satisfaction.
Arnold, Flaherty, Voss and Mowen (2009)	Cognitive Appraisal Theory; Role Stress Theory	A highly competitive climate diminishes the negative relationship between a retail employee's perception of role conflict, role ambiguity and family-work conflict and job efficacy. The positive relationship between a retail employee's job satisfaction and performance will be stronger in a more competitive climate.	374 responses (262 for supervisor related performance) collected from a national sample of retail store employees of a large US-based retailer.	Support for the moderating effect of climate on the role ambiguity-job efficacy relationship, such that the harmful effect of role ambiguity is lessened when competitive climate is high. Higher levels of job satisfaction result in improved performance when the competitive climate is perceived as high.

Homburg, Wieseke and Bornemann (2009)	Role Orientation and Playing	The more the frontline employees adopt customer orientation roles, the greater their accuracy of customer needs knowledge. The more the frontline employees participate in role playing training the greater their accuracy of customer needs knowledge.	Two large-scale field studies in German travel agencies. Study 1: 215 employees in 92 travel agencies. Study 2: 105 travel agencies with 237 employees and 489 customers.	Role orientation and role-playing training have an interactive effect on accuracy of customer need knowledge.
Joshi (2010)	Salesperson Role Behaviors	Role behaviors that build salesperson trustworthiness amplify the positive influence of compliance-generating strategies, and mitigate the negative influence of compliance-impeding strategies	149 product managers in industrial machinery, electronic electrical equipment and transportation industries	Enhancing and protective effects of salesperson trustworthiness are supported. Salespeople are encouraged to engage in role behaviors that build trustworthiness.
Bell, Mengüç and Widing (2010)	Social Learning in Individual Salesperson Roles	Organizational learning is bolstered when salespeople include learning in their roles; Organizational climate for learning and efficiency of information dissemination amplify this effect.	422 area sales managers from 113 retail stores	Salesperson learning mediated by organizational learning significantly enhances store performance. Learning climate amplifies the effect of salesperson learning, but dissemination efficiency does not.

boundary *transactions* to boundary *interactions* that build, grow and sustain customer relationships. Boundary interactions go beyond consummating exchanges to include boundary bridging and blurring (Hunter and Perreault 2007). In boundary bridging, organizations reach out to customers to access knowledge about how their products and services solve idiosyncratic customer problems in situ. Through boundary blurring, organizations make boundaries permeable to facilitate knowledge development and transfer through customer co-production and co-creation processes. Together, boundary bridging and blurring enrich both the breadth and depth of variation in boundary roles.

Second, technological advances and globalization have intensified competitive pressures. For example, in a survey of practitioners in B2B markets, Zoltners et al. (2008) find that managers identified external threats in terms of 'increasing buyer power', 'new competitors entering markets', 'competitors offering lower prices', 'industry deregulation' and 'new forms of distribution threatening existing channels'. Technology has opened markets by demolishing barriers and allowing far-flung competitors to enter new markets with few constraints. It has also enabled those endowed with abundant resources to influence markets dramatically by pressuring prices and setting new price-quality frontiers.

Ironically, the increasing intensity of competition has amplified the importance of boundary work in achieving sustainable competitive advantage. For example, Boaz et al. (2010) surveyed more than 1200 purchasing managers to find that though they insisted that price was a dominant factor, their *actual* vendor performance evaluation was more heavily influenced by overall sales experience. Critical to overall sales experience is boundary work that engages customers effectively with meaningful interactions, demonstrates competence in effective problem-solving based on sound product knowledge and breeds trust by placing customers' interests above self-interest. Although these topics are seeping into empirical research on boundary work in marketing (Hunter and Perreault 2007), theoretical development of boundary role theory has lagged.

Third, to cope with increasingly uncertain and competitive environments, firms have begun to think strategically about boundary work by actively managing the scope and significance of boundary roles (Storbacka et al. 2009). In the area of sales management, this shift is evident in the growing interest in key account and strategic account management (KAM/SAM). These approaches view boundary roles as critical, not just for facilitating exchanges but also for forging and building the lifetime value of long-term relationships with key customers (Homburg et al., 2002). This approach acknowledges that boundary role personnel manage the organization's most important asset: its customers.

From this point of view, boundary work encompasses the task of leading inter-functional coordination efforts to respond to customization needs and management for profitability in customer relationships (Storbacka et al. 2009). Many KAM/SAM programs involve cross-functional teams, including marketing personnel that salespeople coordinate in the interest of connecting closely with customers (Homburg et al., 2002). Using case studies in B2B contexts, Storbacka et al. (2009) identify three themes that characterize the evolving sales role: (1) from sales as a function to customer management as a process; (2) from isolated to integrated sales departments that rely on

Table 24.2 Changing boundary work for customer connectivity: myths and new market realities

Myth	Reality
Boundary roles are a consequence of well-defined job descriptions and the people who fill them.	Boundary roles are a consequence of emergent processes for keeping marketing promises.
Effectiveness of boundary roles involves implementation issues, such as execution of customer-contact scripts and reliable performance.	Effectiveness of boundary roles involves building dynamic customer interface capabilities that create value, are hard to imitate and yield competitive advantages.
Organizational boundaries are exogenous to boundary roles. The purpose of theory is to understand and manage boundary roles for effective maintenance of organizational boundaries.	Organizational boundaries are endogenous to boundary roles. The purpose of theory is to understand the interconnectedness of boundary managing and making for organizational effectiveness.
Theories for understanding boundary roles are rooted in human resource logics, such as control, motivation and empowerment.	Theories for understanding boundary roles are rooted in marketing logics, such as relationships, value and competition.
Boundary roles are central to knowledge exploitation.	Boundary roles are as central to knowledge exploitation as they are to knowledge exploration.

cross-functional teams; and (3) from operational focus on selling to strategic focus on customer problem-solving. Emergent practice in B2B relationships is moving toward *inter-organizational* project teams that either involve two or more suppliers teaming up to provide superior solutions to a buyer or involve members from buyer and seller organizations collaborating to provide customized solutions to buyers (Jones et al. 2005).

Despite this increasing attention to the expanding role of team selling in practice, theoretical and empirical research remains limited. In a rare empirical study, Stock (2006) finds that *inter-organizationality* in buyer–seller teams – the degree to which power and membership is balanced – enhances team effectiveness, especially when market and technological uncertainty are high. Thus, approaches to boundary roles that do not take into account their expanded scope (e.g. blurred internal and external boundaries; management of relationship value) are likely to be out of step with emergent practice.

Collectively, customer-, competitor- and organization-driven forces challenge key principles and concepts of boundary role theory, as we develop next. As noted previously, we present these challenges in a myth–reality rhetorical framework in which we present boundary role principles that are out of step with emergent practice as myths. We purposely build this contrast to stimulate (or perhaps provoke) fresh theoretical ideas, with full recognition that we risk drawing black-and-white comparisons in some gray areas. Table 24.2 summarizes the five key contrasts we develop to challenge conventional thinking about boundary roles and crystallize emergent ideas for new conceptualizations.

CHALLENGES TO CONTEMPORARY BOUNDARY ROLE THEORY: MYTH AND REALITY

Myth no. 1: Boundary Roles are a Consequence of Well-defined Job Descriptions and the People who Fill them

Conventional wisdom in role theory construes 'boundary roles' as a means for translating supplier and buyer goals into sets of specific expectations for boundary spanner performances (Adams 1976; Biddle and Thomas 1966). Often, organizational manuals, training programs and cultural norms institutionalize role expectations by specifying desired behaviors of individual salespeople. In turn, role behaviors can be monitored and linked to incentives to align salesperson goals with those of the firm. However, this does not imply that role expectations are free of conflict or ambiguity (Singh and Saatcioglu 2008). Because of their different goals, supervisors and customers may have different, often contrasting role expectations; supervisors expect salespeople to give priority to organizational goals, while customers expect salespeople to give priority to their goals. Likewise, behavior-goal linkages can rarely be fully specified unambiguously. Although role theory does not discuss goal-directed role expectations explicitly, it does theorize concepts such as role conflict and ambiguity as resulting from the differing behavioral expectations of diverse role partners (e.g. suppliers, customers). Moreover, drawing from the literature on role stress, boundary role theory offers a sturdy framework for examining the functional and dysfunctional consequences of conflicted and ambiguous role expectations for salespeople's performance and well-being (Kahn et al. 1964).

This approach, focusing on human capital, encourages firms to strike a balance between role expectations and organizational support to ensure the effectiveness and welfare of boundary spanners (Singh 1998). Findings from this literature suggest that the organization's setting of role expectations and boundary spanners' efforts to meet them are complex processes that can result in dysfunctional outcomes for organizations and their employees.

Emergent conceptions of boundary roles reject the deterministic notions that role expectations are relatively static and prescribed by external role partners with enough specificity to enable consistent and uniform performances by groups of role incumbents. Recent research has noted that individuals do not simply enact socially encoded roles. Instead, as customer-, competition- and organization-driven forces increase market dynamism and uncertainty, salespeople proactively craft their *own* roles to satisfy environmental demands (e.g. What activities should I perform?) and shape their interactions (e.g. How should I interact with role partners? Griffin et al., 2007; Wrzesniewski and Dutton 2001). Although many roles involve sets of core activities and interactions that allow little flexibility (e.g. salespeople must meet sales quotas and interact with customers), role boundaries are also usually fuzzy, allowing emergent activities and interactions. These are often improvisational in response to unexpected contingencies and, in turn, result in dynamic change in roles (Ilgen and Hollenbeck 1992). Wrzesniewski and Dutton (2001) observe that when individuals have some flexibility, they attempt to assert control over outcomes and bring meaning to their roles through proactive role crafting. That is, individuals make situational claims about 'who they are and why what they do

matters as part of the social identity created at work' without altering their authentic identity (Wrzesniewski and Dutton 2001, p. 180).

Thus, salespeople may claim the social identity of 'friend' to invoke scripts favoring intimacy and affection because they perceive this as conducive to favorable role outcomes. However, this 'strategic' identity may be limited to work, apply only to select customers and be distinct from other identities enacted with other customers. Griffin et al. (2007) note that role crafting is especially relevant when desired outcomes are uncertain and interdependent.

Focus on role crafting extends and transcends work on adaptive selling and influence tactics in sales management (Brown 1990; McFarland, et al., 2006; Spiro and Perreault 1979; Spiro and Weitz 1990). Buyer heterogeneity renders a 'one-size-fits-all' approach ineffective and requires salespeople to adapt role crafting to the perceived needs of individual buyers and situations in which they interact (Spiro and Weitz 1990; Szymanski and Churchill 1990). Because both buyer needs and situations evolve and are not easily predictable, salespeople need to be continuously mindful of emergent changes and craft the roles they enact to maintain and build relationships with individual buyers (McFarland et al., 2006). Salespeople may also anticipate changes and engage in role crafting to influence buyer expectations and respond proactively. Role crafting constitutes a flexible, dynamic approach to boundary work that requires ambidexterity in the enactment of disparate roles.

Although few prior studies have advanced theoretical frameworks for adaptive boundary work, recent empirical studies highlight its theoretical relevance. For example, McFarland et al. (2006) find that salespeople are effective only when they match influence tactics to the individual orientations of buyers. No studies to date have examined salespeople's efforts to enact roles that match buyer orientations and create particular types of relationships with them. Practitioner reports suggest that such boundary work is common, and academic research acknowledges its importance (Brown 1990; Saxe and Weitz 1982).

Myth no. 2: Effectiveness of Boundary Roles Involves Implementation Issues, such as Execution of Customer-contact Scripts and Reliable Performance

The diverse body of boundary role literature in marketing indicates that providing an effective, efficient customer interface is the primary requirement of organizational front lines (Table 24.1). This is evident in the boundary role outcomes that are often examined in the marketing literature. Consistent with *customers'* role expectations that sales and service agents will be effective in fulfilling their needs, providing creative solutions and anticipating future problems, research has examined relationship quality, customer satisfaction and trust as key boundary work outcomes. In addition, consistent with the supplier organization's role expectation that sales and service agents will be efficient in serving customers, studies have focused on sales performance, productivity and profitability outcomes. Pursuing the divergent objectives of providing *effective* solutions and *efficient* operations exposes boundary agents to tensions and stress, as indicated by a substantial volume of research on role stress (Goolsby 1992; Hartline and Ferrell 1996; Singh 1998). A typical organizational response to the efficiency–effectiveness tension in boundary roles is development of exemplary scripts for customer contact and problem-solving

that can be used for training and setting role expectations. The work of Solomon et al. (1985) constitutes an early attempt to elaborate on the notion of role scripts in service settings. Subsequent scripting of role performances has become a staple in professional selling (e.g. SPIN ‘situation, problem, implication, need pay-off’ selling; Friedman 2004). Scripting has been viewed as a quality control device to ensure that boundary agents do not deviate from desired actions and reliably deliver target outcomes.

Emerging practice, driven by customer, competitor and organizational forces, recognizes that a firm’s competitive strength lies in consistently delivering superior value to customers who are differentially attracted to the company’s products and services. To achieve this, a firm needs to build dynamic capabilities for providing superior value to heterogeneous customers without sacrificing operational efficiency. In conventional thinking, making special accommodations for customers constitutes a ‘shock’ to an efficiently designed value delivery system. However, in emergent thinking, boundary agents serve a critical role in developing individualized relationships with buying organizations and offer customized solutions with minimal disruption of the efficient operation of the firm’s value delivery system. In this sense, a central element in emergent practice is the buffering role of boundary spanners in simultaneously accommodating the variability of customer needs and preserving the operational efficiency of core organizational processes.

Boundary work often involves tasking second-order boundary-spanning agents with handling customer demands that cannot be adequately addressed by the frontline agent. An example is a system that allows for escalating levels of customer service through utilization of technologically mediated frontline systems. Customer service problems that cannot be resolved on the boundary result in either dissatisfied customers and negative word of mouth or costly disturbances to the value delivery system to resolve the problem. Thus, customer selection and prioritization of efforts to serve customers who respond most favorably to the firm’s value proposition have important strategic implications. Designing boundary work from a systems perspective remains a neglected theoretical and empirical topic.

More typically, firms are upgrading (i.e. *upskilling*) boundary roles to infuse them with capabilities for sensing and responding to dynamic and unpredictable customer heterogeneity. Boundary agents are viewed as problem-solvers who work closely with customers to co-create value customized for individual customers’ needs. Such a view, which is increasingly becoming incorporated into the core principles of relationship marketing, redefines the meaning of scripts and deviations from them. While scripts are guides to behavior based on past experiences, deviations from them are deliberate efforts to collaborate, customize and co-create. Deviating from scripts to respond to changing customer needs and conditions is essential to boundary agent effectiveness. Thus, firm performance is enhanced by allowing boundary agents to deviate from standard scripts to accommodate customer heterogeneity, while buffering internal processes to promote operational efficiency. In this sense, the emergent view of boundary roles redefines the effectiveness–efficiency paradox as a frontline issue and highlights the importance of its resolution for enhancing firms’ competitive position.

Myth no. 3: Organizational Boundaries are Exogenous to Boundary Roles

Conventional studies of contemporary boundary role theory focus on effectiveness in meeting or exceeding expectations set by organizations, including sales quota, com-

plaints handled, customer satisfaction and service quality (Behrman and Perreault 1984; Hunter 2004; Singh 1998; Solomon et al. 1985). Thus, much research has embraced theoretical perspectives that predict the influence of different individual, group, organizational and environmental factors on boundary role effectiveness. The premise underlying these theories is that organizational boundaries are fixed or exogenous and that they remain stable to allow predictions of boundary role effectiveness without accounting for endogeneity or variability in boundaries.

Focusing on boundary roles and performance in them without considering the boundaries themselves ignores the boundary-making function of personnel who occupy boundary roles. Charged with responsibility for forging and growing relationships with external role partners, boundary role occupants do not simply execute scripted routines outlined in given job manuals. Indeed, in many cases, they cannot. Most formal job requirements are incomplete contracts that do not fully specify role expectations or the specific boundaries that define the role (Wrzesniewski and Dutton 2001). Given incomplete contracts, role occupants must craft and construct their roles and negotiate boundaries with relational partners during role enactment. In this sense, role boundaries and expectations are emergent processes that occur during and are not separate from or antecedent to role enactment.

For example, in a B2C context, Price and Arnould (1999) found that role boundaries varied substantially in practice; some customers were averse to forming commercial friendships and preferred an arm's-length relationship, whereas others welcomed strong friendly bonds based on reciprocal self-disclosure. Likewise, in a B2B context, Heide and Wathne (2006) take a more dynamic view of boundary roles by viewing 'friends' (a relational identity that blurs boundaries) and 'businesspeople' (a transactional identity that affirms boundaries) as two extremes on a continuum and role partners engaged in a continuous negotiation of boundaries for mutual benefit. More important, because of the constant tension between the relational and transactional identities (Grayson 2007), role boundaries are neither predictable nor stable. Instead, they depend on how role partners craft and enact their roles.

Thus, boundary making and boundary managing are symbiotically linked processes that are inherent to boundary roles. Viewing boundary roles from this perspective reveals limitations of conventional theoretical approaches that omit the boundary-making function. In practice, outsourcing decisions amount to determinations of where firm boundaries should be located. The nature of boundary roles, in terms of demands imposed by customer, firm and transactional characteristics, is a primary influence on firms' boundary location decisions. Boundaries are not exogenous but are determined in large part by decisions regarding the most efficient and effective ways to fulfill boundary roles.

Myth no. 4: Theories for Understanding Boundary Roles are Rooted in Human Resource Logics

As is evident from the preceding discussion, a great volume of research has relied on theories of role stress, control and motivation to better understand boundary roles. Research drawing on role stress theory examines challenges posed by conflicting or ambiguous roles and individuals' coping mechanisms to maintain effectiveness and

avoid burnout (Goolsby 1992). Research based on control theory explores how the focus (e.g. process or outcome), degree (tight or loose) and form (e.g. formal or informal) of organizational control systems direct boundary spanners toward organizational goals (Challagalla and Shervani 1996). Likewise, motivational studies examine how role occupants can be influenced to invest personal resources to achieve normative types and levels of performance using extrinsic incentives, goal setting and identity engagement, among other factors (Brown et al., 1997, 1998).

Although these theoretical approaches differ in perspective, they share a common focus on managing boundary-spanning personnel effectively. Conventional theories of human resources typically focus on practices and procedures for selecting, motivating, training and retaining employees to meet predetermined objectives. Such theoretical approaches are well suited to problems of managing for boundary role effectiveness, but they are not as well adapted to problems that involve dynamic boundary management processes.

Although recent human resource theories are beginning to embrace strategic perspectives, meaningful conceptions of emergent boundary practices require a fundamental departure from current approaches to focus on concepts such as learning, innovation and adaptability in customer interactions. Human resource theories do not provide adequate frameworks for addressing these concepts. Relationship theory begins to address these issues by shifting attention from roles to relationships by focusing on establishing, developing and maintaining sustainable relational exchanges with customers (Morgan and Hunt 1994). This shift does not diminish the significance of boundary roles. In their meta-analysis, Palmatier et al. (2006, p. 151) conclude that relationship marketing strategies are more effective when 'they are focused on building interpersonal relationships between boundary spanners [and customers] than [when they are] focused on building customer-firm relationships'. Weitz and Bradford (1999) characterized this shift as a move from 'making sales' to 'making and keeping relationships' through a partnering role of the salesperson rooted in relational selling (Crosby et al., 1990; Joshi 2010).

Likewise, the framework of the service-dominant (S-D) logic is consistent with boundary making because it emphasizes the centrality of value-creating processes in marketing-oriented organizations. In the S-D logic, the customer is always a co-creator of value, and marketing is an enabler ('facilitator and structurer') of the co-production process. The focus on customer primacy, in co-creation with boundary spanners, emphasizes boundary making, as individual boundary agents craft roles that enable co-creation of value for customers in light of their individual needs and contexts (Joshi 2010). Finally, the literature on sustainable competitive advantage has increasingly coalesced around a knowledge-based view of marketing organizations that coheres with relationship marketing and value co-creation perspectives. According to this view, organizations that are more effective in capturing new knowledge generated at customer interfaces *and* transferring it for use across organizational units are more likely to survive than those that are less adept at knowledge capture and transfer (Homburg et al. 2009). Although the role of knowledge in boundary spanning has received some attention in the marketing literature, the emergent view of knowledge-based organizations redefines and restructures boundary roles in ways that go far beyond conventional thinking.

Myth no. 5: Boundary Roles are Central to Knowledge Exploitation

Consistent with the conventional view of boundary roles, much contemporary research has been guided by the idea that boundary roles are fulfilled through top-down learning processes that exploit organizational knowledge. That is, rules and responsibilities emanating from the top levels of the organization are woven into boundary roles, which boundary role personnel then learn and enact. For example, Lam et al. (2010) demonstrate that through their actions, top managers function as marketing-oriented role models for middle managers and work group expert peers who, in turn, serve as envoys of market-oriented behavior to frontline employees.

Thus, the marketing strategy literature has traditionally developed frameworks characterizing intelligence dissemination as movement from strategic decision-makers to employees (or from marketing managers to non-marketing managers), who employ this intelligence in performing their job functions (e.g. Maltz and Kohli 2000). In a similar vein, Bharadwaj et al. (1993) argue that a critical factor for achieving competitive advantage in service organizations is corporate culture, characterized as a set of values and beliefs that govern the way employees act. Sharma et al. (2000) discuss how salespeople's knowledge structures with respect to customer needs are developed through proactive training and supervision. They conclude that when knowledge structures are rich and distinctive, they positively influence sales performance. Likewise, Morhart et al. (2009) show that structured training fosters frontline learning of brand-specific transformational leadership skills. In a similar vein, De Ruyter et al. (2009) examine the effectiveness of environmental information dissemination and its use in organizational front lines, and Sundaram et al. (2007) investigate the impact of salespeople's use of technology designed for distribution of market intelligence on individual sales performance. Finally, Wang and Netemeyer (2002) estimate the impact of job structure (e.g. autonomy) and task demands on salespeople's learning, which in turn influences their self-efficacy and service performance.

Emergent practice challenges the earlier focus on knowledge exploitation in boundary roles. The change and uncertainty wrought by customer-, competitor- and organization-driven forces foreshadow an enlarged scope of boundary work that emphasizes knowledge generation, rather than just exploitation. Knowledge generation involves exploration or 'the pursuit of knowledge, of things that might come to be known' (Levinthal and March 1993, p. 105) and involves 'variation, risk taking, experimentation, play, flexibility, discovery, [and] innovation' (March 1991, p. 71). Day (2000) argues that most working knowledge about customer relationships, especially in B2B settings, is tacit, dispersed and held by individual salespeople and account managers. Harnessing this dispersed knowledge is a key adaptive capability and an essential ingredient of competitive advantage. Joshi (2010) notes that B2B selling activity in the past two decades has shifted, such that salespeople must be skilled not only in managing customer relationships but also in communicating market knowledge back to the organization. He develops a process through which salespeople can successfully change the way product management teams develop and modify products. Similarly, Bell et al. (2010) find that salesperson learning has the potential to enhance retail performance of the firm by increasing its capacity for organizational learning. Furthermore, De Jong et al. (2004) recognize facets of bottom-up learning in their framework of service climate

in boundary-spanning self-managed teams (SMTs). In operationalizing service climate, they capture the extent to which boundary-spanning SMTs make suggestions for improving service quality. Their findings indicate that the service climate of boundary-spanning SMTs has positive effects on perceived service quality and customer share and a negative effect on sales productivity, particularly for non-routine services.

The preceding is in line with emerging research that reveals the intricate role of frontline autonomy in effective services management. Marinova et al. (2008) demonstrate that frontline autonomy mediates the effects of strategic orientations for quality and productivity on revenue, efficiency and customer satisfaction. They also show that unit cohesion enhances the positive influence of autonomy on revenue and customer satisfaction without increasing its negative effect on productivity. Overall, functional mechanisms that support boundary role execution, such as frontline autonomy and self-management, are conducive to generation of knowledge-in-practice by frontline employees.

A bottom-up learning process is needed to codify such practice-driven knowledge and transform it for use in organizational adaptation and change. Knowledge generation and exploitation processes are closely linked and dynamically embedded in boundary roles. New theoretical approaches that jointly address knowledge exploration and exploitation processes are needed to help organizations maximize performance outcomes and more thoroughly integrate the contribution of front lines to organizational learning in marketing thought. Research has argued that for a firm to experience continual and long-term success, it must establish a balance between exploratory and exploitative activities (March 1991; Raisch et al. 2009). Theoretical approaches that focus narrowly on exploitation, however compelling, are unlikely to offer adequate explanations for the emergent practice.

MANAGERIAL IMPLICATIONS AND CONCLUSIONS

Managerially, this chapter focuses on and develops the implications of emerging market realities that increasingly challenge, and even marginalize, premises and predictions of contemporary boundary role theory in marketing. These new realities include customer-driven focus on co-creation and solution selling, competition-driven pressure on value creation and innovation and organizational emphasis on sales productivity and inter-functional cooperation. Admittedly, to highlight their implications, we have pushed the challenges of new realities to exaggerate contrasts and highlight differences. Nevertheless, the new market realities are significant enough to require that managers shed long-held principles, view boundary roles from new perspectives and construct fresh approaches. Managers as well researchers motivated to pursue these possibilities should consider at least five clear implications of our work.

First, we recommend that managers consider and adopt new perspectives on boundary roles within their organizations that reflect emergent market realities and then systematically leverage these new perspectives for boundary spanner effectiveness. Managers may find it particularly useful to partner with researchers and consultants to support development of new role constructs (e.g. role crafting) and theorize their influence on boundary spanner performance, satisfaction and commitment. With rare exceptions, most role research in marketing has relied on outdated role constructs developed in the 1960s by

management scholars. Original grounded work is needed that begins with in situ studies of role behaviors and practices of boundary spanners in B2B contexts to germinate new constructs that are meaningful instruments for understanding emergent realities. This area of development is ripe for practitioner–scholar partnership.

Second, our research suggests that managers develop a differentiated consideration of organizational boundaries that is rooted in a strategic perspective of boundary roles. With this differentiated perspective, organizational boundaries are neither fixed nor constant for all customers. Rather, managers need to strategically evaluate the following questions: for which customers should they blur boundaries, and conversely, for which customer should they maintain boundaries? What kinds of role behaviors are differentially associated with these choices? The answers are not obvious. Customers that are smaller in size and/or lower in profitability may be strategically more important because they offer unique boundary-learning opportunities not found elsewhere. Thus, managers are well advised to map and examine the relationship between boundary roles and organizational boundaries and the patterns associated with firm effectiveness.

Third, building on the differentiated perspective, we can advise managers that effective boundary management will probably require dynamic shifting among boundary making, blurring and maintaining functions in systematic patterns for the *same* customer. A customer who is in boundary-blurring relationships today may be involved in boundary-maintaining relationships tomorrow. Fresh thinking is needed to understand boundary role behaviors that support such dynamic transitions. From a theoretical perspective, this means that scholars and researchers need new theories for understanding boundary roles and boundary management as a dynamic strategic process with explicit consideration of the rate and direction of change. Such dynamic frameworks for navigating boundary making and blurring and maintaining functions are likely to yield new insights to guide managers' quest for sustainable competitive advantage.

Fourth, our research emphasizes that emergent realities will require that managers understand the knowledge-creating capabilities of boundary roles and the organizational implications of its exploitation. The learning capabilities that reside in organizational boundaries and the distinct competitive advantages they represent are both currently underappreciated and undertheorized. Boundary role behaviors that are crucial to such learning capabilities are unknown. Researchers can play a critical role in opening the black box of boundary role learning processes. Such processes can be understood as bottom-up learning, which has attracted recent attention and development. More grounded and experimental work is needed to develop a pragmatic mapping of boundary role behaviors conducive to learning and to determine whether such behaviors come at the cost of short-term effectiveness. Practitioners and scholars alike are challenged to resist viewing boundary role learning as inherently useful. Little is known about the extent to which knowledge generated through boundary role processes is useful and can be exploited to drive enterprisewide change in managing organizational boundary roles.

Fifth, and finally, managers will need to rethink hiring, training and motivational approaches for boundary spanners based on new theorizing of boundary roles proposed here. New models are needed to understand how to attract, motivate and retain boundary spanners capable of conceiving and performing boundary role behaviors that respond, not to extant thinking, but to new and emergent realities. Our study is a blueprint for managers and researchers to embark on fresh thinking and develop new models.

NOTES

1. We use the term 'boundary work' to refer broadly to cognitive and behavioral efforts of salespeople to manage their boundaries with customers and develop relationships of appropriate type and intensity with a diversity of customers. We develop this term further herein.
2. While searching the literature, we identified several well-cited articles from the *Journal of Personal Selling & Sales Management* in the review. We included these articles in our review; however, we did not intend to conduct a more thorough search of this journal.

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