

NAUTILUS, INC.: DEALING WITH A LONE WOLF IN THE SALES TEAM¹

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“Headquartered in Vancouver, Washington, Nautilus Inc. is a global fitness products company providing innovative, quality solutions to help people achieve a healthy lifestyle. With a brand portfolio including Nautilus®, Bowflex®, Schwinn®, and Universal®, Nautilus markets innovative fitness products through direct and retail channels (Bean 2013).”

Nautilus, Inc. has a strong sales organization with remarkably low turnover of salespeople. They take a consultative approach to sales. Among the group, however, is a “lone wolf” who generally makes transactional sales rather than being consultative and focuses on her individual results rather than the objectives of the company. At the same time, she has the top sales results of the group. She also has an outstanding work ethic and works very hard. She is good at multi-tasking and never takes breaks between calls to rest or socialize with co-workers.

There are several potential issues in this case. The objective is to determine how to optimize the effectiveness of the sales organization. Part of that is determining how to deal with the lone wolf. How do her methods and results affect the rest of the sales team? Do her results justify her methods, or is it more important to have everyone following the company direction of consultative selling?

BACKGROUND—COLORFUL HISTORY OF A FITNESS COMPANY

The origin of the Nautilus company can be traced to Arthur Jones Productions, established in 1968 and soon to be renamed Nautilus Sports/Medical Industries, Inc. Arthur Jones, the founder of the company, was an inventor and ahead of his time in the fitness industry. More importantly, he was a marketing genius. He was a pioneer of exercise machines (rather than just free weights) and also a pioneer of the infomercial, celebrity endorsers, and the use of “before and after” pictures.

Arthur Jones sold Nautilus in 1986 to Bowflex, and Brian Cook became the CEO. After this point, the company was more similar to the former Bowflex company than the former Nautilus company, but Nautilus was retained as the company name and it

¹ The authors thank Nautilus for allowing us to study their Direct Sales organization. This is a factual case except that “Theresa” is not the real name of the lone wolf in the organization. Data was gathered through a literature search, meetings with all levels of the Direct Sales organization, and many hours sitting with Sales Professionals and listening in on their calls throughout the summer of 2013. A draft of the case was submitted for review by Nautilus management to assure accuracy. Nautilus management has been very gracious about this project and only requested that we omit some numbers regarding the organization and compensation.

became publicly traded under that name in 1999. Under Cook's leadership, the company added more brands and grew to a size of 1200 employees (Sherwood, 2013B).

The years 2003-2011 were a tumultuous time for Nautilus. Three different CEOs led the company during this time. The company suffered serious problems with manufacturing and logistics. Profits disappeared. The company grew to 1500 employees, and then was slashed to 340.

In 2011, Bruce Cazenave was named as CEO. Cazenave had a strong background of senior executive leadership and turning companies around at Black & Decker, Timberland, and Timex. He returned Nautilus to profitability, from a loss of \$9.8 million in 2010 to profits of \$2.5 million in 2011 and \$10.6 million in 2012 (Sherwood, 2013B).

Cazenave also returned the company to growth, but cautiously. The hurdles for new products to be introduced were lowered from a nearly impossible level, and new products were launched. As the economy continued to recover from a major recession, Nautilus introduced lower-priced products. Previously, most of the consumer products cost more than \$1000, requiring most consumers to obtain financing to purchase them. For the more expensive items, additional sources of potential financing were secured for potential customers, greatly increasing their chances of qualifying, and thus being able to make the purchase. Cazenave also increased advertising spending 10% in 2013, over 2012. The ad campaign began to emphasize infomercials less and the web more. Within the company, Cazenave has built an emphasis on customer service and customer satisfaction.

PRODUCTS

Nautilus offers a comprehensive assortment of home exercise equipment. Nautilus was previously known for innovative exercise equipment for gyms. The current product offerings are for home use.

- **Bowflex Max Trainer:** This is a new product and an advanced exercise machine. It is similar to an elliptical exercise machine in that it gives a zero-impact cardio workout, but it gives a much more intense workout and works the upper body. It is designed for workouts that last only 14 minutes. It is compact, to fit more easily in smaller rooms.
- **Bowflex TreadClimber:** Prior to the Max Trainer, this was the top selling product. It is similar to a treadmill but has separate treadles for each foot that incline alternately, giving greater resistance and burning more calories.
- **Schwinn and Nautilus Exercise Bikes:** There is a wide variety of stationary bicycles. Some are upright, some are recumbent, and some also work the upper body.
- **Schwinn and Nautilus Ellipticals:** Designed for zero-impact cardio workouts, there are several upright models and one recumbent model.
- **Bowflex Home Gyms:** These are the familiar Bowflex body-building machines.

- Bowflex CoreBody Reformer: This is a unit that lies on the floor with cables and hand straps for pulling. It is targeted at women and has an accompanying video of exercises to follow. It works the core and also provides a cardio workout.
- Bowflex Free Weights: This product line includes kettle bells, dumbbells, stands, and benches. The dumbbells feature a system that allows for the weight to be adjusted by simply turning a dial.
- Accessories: There is a wide range of accessories including pads, heart rate monitors, covers, and apparel.

DIRECT SALES ORGANIZATION

Nautilus has two sales channels. The retail channel utilizes sporting goods retailers to sell some of their products to final consumers. The direct channel involves selling directly to final consumers on the internet or over the phone. In the summer of 2013, the Direct Sales organization for consumer phone sales consisted of Sales Managers, Supervisors, and salespeople referred to as “Sales Professionals,” located at the company headquarters in Vancouver, Washington. The Sales Professionals are a diverse group in terms of age, experience, expertise, education, gender, and ethnicity.

CONSULTATIVE SELLING

The concept of consultative selling originated in 1970 (Hanan, 2003). Although it was originally developed as an approach for key accounts in business-to-business sales, it has been used widely and adapted for use in sales to consumers such as those that are conducted by the Nautilus Direct Sales organization. Consultative selling is distinguished from transactional selling in that the needs of the buyer and the benefits to be realized are the foci, instead of the product. Sellers act in a consultative role to help buyers achieve their goals, and an adversarial interaction is replaced with a win-win partnership. These interactions facilitate the development of relationships between the individuals or organizations. In transactional sales, prices are often derived from costs and discounts are often used to make the sale. In consultative selling, prices are based on value, and if the value is effectively sold, prices are not discounted.

Consistent with the CEO’s emphasis on customer service and customer satisfaction, Nautilus Sales Professionals are trained to use a consultative selling approach with prospective customers, and they are expected to use this approach. To aid with the consultative aspect, some of the Sales Professionals are body builders, fitness enthusiasts, or former personal trainers. These tend to position themselves with the prospects as fitness consultants—fitness experts that can advise about personal fitness plans and the needed equipment. The expertise of other Sales Professionals is mostly about the products for sale and the benefits of those products.

Sales contacts are generally initiated by a prospective buyer expressing interest in a specific model of exercise equipment. A Sales Professional, correctly using a consultative selling approach, would initially steer away from a discussion of the specific equipment and to the fitness goals, needs, physical limitations, and financial constraints of the prospect (Futrell, 2014; Sokol, 1979). The Sales Professional acts as a problem

solver (Wotruba, 1991) and is then in a position to recommend the optimal solution for the prospect. The result is that the sale may include more equipment than was originally considered. Also, the buyer is more likely to be satisfied with the purchasing experience and with the products (Wotruba, 1996). Although it is probably not appropriate to say that a “relationship” has been created during this interaction, there is a better chance that rapport with the Sales Professional and goodwill toward the company has been developed. These will increase the probability of favorable word-of-mouth about the company and the possibility of purchases of more equipment in the future. A final advantage of consultative selling is that the needs-based interactions can provide important market intelligence for the company (Wotruba, 1996, de Jong et al, 2014). The sales people that are thus engaged, gain information about needs for changes in existing products, needs for new products, and perceptions about competing products and companies.

The disadvantages of a consultative approach strategy are that salespeople are more difficult to identify and hire because they need greater skill, and consequently, they need to be compensated at a higher level. Also, although taking longer for each call may result in greater revenue per sale, fewer calls can be handled and the number of sales in the short term is likely to be fewer. The alternative is to bear the extra expense of having more salespeople in order to complete the same number of calls within a time period. (Castleberry & Tanner, 2014).

Guenzi (2003) has defined transactional selling as emphasizing the acquisition of new clients rather than nurturing current clients. For the purposes of this paper, we define transactional selling as being the selling situation described by Castleberry and Tanner (2014) as “solo exchanges,” in which there is no expectation of engaging in any future transactions. In a sales organization that has a strategy of using transactional selling, the salesperson acts more as a check-out clerk than a consultant. For Nautilus, this would mean that the sales professionals merely try to close sales for the products about which callers are inquiring. The sales would be made by offering discounts rather than by consulting with the prospect and selling on the basis of how the benefits of the product will fulfill the buyer’s needs. The disadvantages are that good rapport is not developed and it is less likely that the product will effectively fulfill needs. Consequently, goodwill toward the company and favorable word-of-mouth about it are less likely to occur. There will be less chance of selling more equipment to the same buyers or attracting their acquaintances as buyers (Castleberry & Tanner, 2014).

Advantages of a transactional approach are that the salespeople do not need to be as highly skilled in the sales process and do not need as much product knowledge. Consequently the organization does not need to be as selective when hiring, and does not need to offer as high levels of compensation. Also, more calls can be handled within a certain amount of employee hours and as a result, there may be more sales in the short term (Castleberry & Tanner, 2014).

Like many sales organizations, Nautilus has more than one sales organization, the retail channel and the direct channel that is the focus of this case. The two organizations are not located together and operate independently of each other. In some

companies that have multiple sales organizations, the selling method differs between organizations, based on the ticket value and the complexity of the sale (Castleberry & Tanner, 2014). Within a specific sales organization, where all sell to the same market, it is important that the selling methods are consistent between salespeople. The organization wants to be consistent, but perhaps more important are the perceptions of the members of the sales force. If salespeople feel that members of their organization are treated differently such that they gain greater rewards, this can result in “malicious envy,” which is characterized by “reduced self-esteem, uncooperative behavior, and even outward hostility towards a coworker (Milovic & Dingus, 2014, p. 119).

THE SALES PROCESS

For some consumers, the sales process occurs entirely on line. For others it begins when they access a company website or view a commercial or infomercial that urges them to call a toll-free number for free information. If they make the call, they are connected with the call center in Vancouver. The Sales Professional that answers the call will agree to send the requested information but will also strive to give necessary information over the phone, answer all the caller’s questions, and will attempt to close a sale. If the caller does not agree to buy, the information is sent and a callback is scheduled. If it is a promising prospect, the salesperson will reserve the callback for him/herself. Less promising callers are scheduled in the system to be called back by any Sales Professional, assigned randomly.

The sales process for the Sales Professional may start in a variety ways. When the salespeople are on line with the call distribution system, calls will be directed to them. The Sales Professionals least prefer distributed outbound call-back calls. These are the prospects to whom Sales Professionals have sent information, but didn’t feel that the prospects were promising enough to save for themselves as call backs. Between the types of distributed calls, Sales Professionals prefer inbound calls from consumers calling in for the first time, after seeing a commercial or an infomercial. When they are not on line, Sales Professionals can call the prospects that they have reserved for themselves. They find these to be more promising and prefer them over either type of distributed calls. Most preferred, however, is the opportunity to call prospects from a common list of potential customers called “Loot.” These leads are people who began the purchase process on line, but for some reason, did not complete the transaction. Some are people who needed to apply for financing and have since been approved. Some are people who selected items but abandoned their shopping cart. Others are those who were initially turned down for financing, but secondary sources had not yet been checked for them. There is no actual “cold calling” to consumers who have not indicated an interest in the equipment for sale. Salespeople are not expected to prospect for their own leads.

The commercials and infomercials do not give prices for the products. The products are expensive, often much more expensive than callers expect them to be. The TreadClimber 10 was the best-selling machine during the summer of 2013. It is priced at \$2,199, plus \$199 for shipping and handling, and \$249 for optional assembly. The price is almost always a challenge for making the sale. Many customers need to have financing arranged for them to be able to make the purchase. The Sales Professionals are

connected on line to check for credit approval for the prospect from three different sources. Customers are offered interest-free financing for 18 months. Sales Professionals often tell the prospects the minimum monthly payment per month, though that payment will not pay off the purchase within 18 months. At that point, an interest rate of 29.99% applies. Sales Professionals will also tell the prospect the monthly payment that would pay off the machine within the interest-free period, especially if they are asked. For example, the minimum monthly payment may be \$82, but \$130 per month is required to pay off the purchase within 18 months.

Observations of Sales Professionals reveal that they have a tendency to just sell the product about which the prospect first expressed interest. They will take a consultative approach about that product, but they are less likely to recommend something else. For example, an overweight diabetic woman with foot problems called in about the TreadClimber. The TreadClimber gives a much more intense workout than a traditional treadmill. The treadmill may have been a better choice considering the health concerns of the caller. While she needed to increase her exercise, she also needed to do it in a way that allowed for a low-intensity workout, especially at first.

The TreadClimber was designed for cardio-vascular exercise and to burn a lot of calories in a short amount of time. These benefits could be complemented by benefits of some of the other Bowflex/Nautilus equipment, to develop a more complete home workout program for the consumer. This is an opportunity for the Sales Professionals to do cross selling. For example, when someone calls about a TreadClimber, the Sales Professional could suggest a set of Bowflex SelectTech Dumbbells for strength and definition, or the Bowflex CoreBody Reformer for strengthening the core and for stretching. Observation of the salespeople, however, has revealed very little suggestive selling of this sort beyond the suggestion of a pad on which to place the TreadClimber.

Follow-up calls are made to customers at a set interval after delivery of the equipment. These calls are made by customer service representatives, not the Sales Professional that made the sale.

WORK ENVIRONMENT AND JOB OF THE NAUTILUS SALES PROFESSIONAL

An impressive aspect of the Direct Sales organization is that salesperson turnover is very low. The average tenure of the team is 6 years, with some Sales Professionals having been there for 13 years or more. This is an unusually long time for salespeople to work in the same position in what could be described as a “call center.” Some of the Sales Professionals previously worked in call centers for other companies and waited many months for positions to be open at Nautilus. There are various reasons for Nautilus’s success recruiting and retaining salespeople.

Nautilus is careful with the selection of salespeople. Qualified applicants for the position are outfitted with a headset and placed with Sales Professionals to listen-in on the sales process. This shadowing opportunity is an important screening aspect of the selection process. Some applicants will self-select out of consideration after observing

the challenges of the job. Those who wish to continue to pursue employment with Nautilus are then interviewed to determine if they are a good fit for the culture of the sales organization and the company.

New Sales Professionals participate in 2½ weeks of initial training that covers product knowledge, financing, payment options, compliance regulations, and call quality. They are then put on line for a time to gain some experience, then they are pulled out for 2-3 days of follow-up training. Supervisors and sales managers provide ongoing training for Sales Professionals in sales meetings that are held on a regular basis. Nautilus has recently added a Sales Trainer to their sales organization who provides individualized coaching for Sales Professionals.

Sales Professionals are evaluated on the bases of results and effort. The Key Performance Indicators are the closing ratio, the number of sales per hour, the percentage of quota achieved, and the number of outbound sales (these are more difficult sales and are acknowledged specifically). There are no specific activity quotas, but the Supervisors monitor the Sales Professionals informally and give direction about activity levels when needed.

Quotas are determined in a top-down fashion. A revenue goal is established for the sales organization based on the projected volume of calls, which is determined from the planned media activity for the period. The revenue goal for the organization is divided equally among salespeople as their sales quotas. Sales Professionals who fail to meet quota repeatedly are placed on a development program and receive extra help from the Sales Trainer. If they are not able to bring their performance up to expectations during the development program, they may be dismissed from the company.

One important aspect of the work environment is that the salespeople have the job title of “Sales Professionals.” The title indicates the company’s perception and expectations of the salespeople—to be professional fitness experts and consultants, distinctly different from employees of off-shore call centers. Training is provided to enable this level of performance. Sales management is very accessible and supportive. The sales managers have chosen to have cubicles among the Supervisors and salespeople, rather than offices away from the sales team.

A particularly strong inducement for attracting and retaining salespeople is that the salespeople are compensated like professionals. Sales Professionals receive a base hourly wage plus commissions. Resulting compensation levels are very competitive for comparable sales positions. Salespeople who perform up to expectations are paid well. Those who exceed expectations are paid very well. A compensation plan must be designed with great care in order to have it motivate behaviors that are aligned to the long-term goals of the company (Madhani, 2014). It is important that commissions be sufficient to motivate salespeople to optimal performance. However, if inducements for high performance are too enticing, or if threats for underperformance are too great, some salespeople may look for shortcuts that may be unethical, or just not in accordance with the direction of the company. In a study of sales and marketing executives, 75% of respondents believed that “the drive to achieve sales goals encourages salespeople to

lose focus on customer needs (Madhani, 2014, p 204; Stout, 2002).” One of the Sales Professionals that was observed at Nautilus was doing poorly and not meeting sales quotas. The researchers observed her taking a sale that should have been credited to one of her co-workers.

Nautilus provides a nice work environment. The direct sales force works at the company headquarters, in a new building that includes a very impressive gym for employee use. The gym is important because it gives the Sales Professionals an opportunity to use the equipment that they sell. If the salespeople believe in the efficacy of the equipment, through their own use, they can represent the products better and enjoy intrinsic satisfaction from improving the health and vitality of people who want to improve themselves. They also enjoy the extrinsic benefits of participating in various employee competitions and other events that are held throughout the year for employee morale and motivation.

Despite all the positive aspects of the work environment, not everyone would enjoy working in sales. The sales function generally pays well because it is challenging. Salespeople are in a boundary position between the company and the prospective customers. They must satisfy the needs of both parties—including objectives that naturally conflict. For example, customers want discounts while the company wants acceptable profit margins.

The commission aspect of the compensation for Nautilus salespeople allows for high earnings for top performers, but it also means low earnings for those who are not producing sufficiently. This is a source of stress that is renewed with each new month and the associated monthly quota. So a great month last month, doesn't help with this month. Some salespeople do not deal well with this sort of pressure. During the summer of 2013, two Sales Professionals were on “development programs” due to performance levels that were less than adequate. One of these was dismissed before the end of the summer.

The type of work that is done by Sales Professionals can get tiresome. It involves many phone calls, one right after another, every day. It takes endurance and a strong work ethic to stay focused and productive. Some salespeople spend too much time between calls or socializing.

One of the concerns of the sales force is the quality of the leads obtained through marketing efforts. It is thought that the more affluent and better-educated prospects shop for Nautilus equipment on line, and so, are not generally available to the direct sales team. The inbound calls come from consumers who are watching the types of television that carry the commercials and infomercials. More affluent consumers, who watch more premium cable channels or streaming television, are less likely to see them. Consequently, it appears to the Sales Professionals that an inordinate percentage of the calls come from small rural communities in parts of the country that have traditionally been plagued with poverty. Although the notion has not been examined by data, some of the salespeople are concerned that the leads that are generated are skewed toward lower socio-economic groups. One particular difficulty for the sales force is the perception that

the top-earning Sales Professional, Theresa is gathering the low-hanging fruit and getting the most sales by doing transactional selling rather than following the company line of consultative selling. Theresa is the “lone wolf” in the sales team.

THE LONE WOLF

A lone wolf is defined as “a psychological state in which one prefers to work alone when making decisions and setting/accomplishing priorities and goals...When working with others, persons operating as a lone wolf have little patience for group process, see others as less effective than themselves, and seldom value the ideas of others (Dixon, Gassenheimer, and Barr, 2004, p. 205).” Different studies have presented different conclusions about the general performance levels and commitment of lone wolves. Dixon, Gassenheimer, and Barr (2004) posit that the effectiveness of lone wolves is diminished because the complexity of current product-market situations call for collaboration. Hoppner (2011) found that lone wolves were just as committed to the company as other salespeople and were less likely to consider leaving the company. Wilson (2012) found lone wolves to be less committed to the organization, but high-performers in regard to sales results. The performance levels of lone wolves is most effectively addressed when more than one type of performance is considered. Mulki, Jaramillo, and Marshall (2007) examined both task performance and contextual performance when evaluating the performance of lone wolves and found that lone wolves tended to have lower contextual performance and subsequently, reduced task performance. In the case of Nautilus, the task performance refers to sales results in terms of sales closed. The contextual performance has to do with teamwork, promoting relationships, and advancing the goals of the company.

As the Sales Professional with the highest sales results, Theresa shows superior task performance. She is perceived, however, to have low contextual performance. There are various explanations for both performance levels. One explanation is that Theresa is very goal-directed and has a very strong work ethic. One of the reasons that she makes more sales is that she handles more calls. When other salespeople may be conferring with each other or just socializing, Theresa is taking and making calls. Theresa’s attitude is exemplified in the schedule that she chose to work. Sales Professionals have the option of working five days a week for eight hours a day or four days a week for ten hours a day. Theresa made her selection on the basis of how it would affect her sales results. She avoids ten-hour days because she recognizes that she is less effective on the phone when she is tired. She also points out that if she were on a four-day schedule, if she missed a day of work, she would only have three days to make up the sales in order to get the results that she wants for the week.

Theresa understands sales as a “numbers game.” She knows that more calls mean more sales. Her work ethic, however, is not the only explanation for Theresa’s call volume and sales results. She apparently has not bought-in to the company direction of consultative selling. Her sales calls tend to be very transactional. For example, on one call, Theresa was telling the potential customer about a promotion that included a free body tower. The prospect couldn’t understand. She thought that Theresa was saying “buddy tower,” and wanted to know what it was. Instead of probing to understand the

prospect's question and consult about the use of the products, Theresa ignored the question and started pushing another promotion and the purchase. She is able to handle more calls because, by skipping the consultative processes, her calls are shorter. But she is not supporting the company direction of consultative selling for building rapport and making future sales to the same customers more likely.

Theresa has a clear idea of the best opportunities for sales. She accesses the Loot leads more than any of the other Sales Professionals. She makes many sales to those leads. It is thought that her superior sales results may be partially a result of her contacting more than her share of the best leads.

Theresa is very devoted to her family. She works the early shift, 6:00 AM-3:00 PM, so that she can be home when her children are home from school. With the commissions that she earns, she is also able to support the family well. Theresa appears to believe that she has found the ideal work situation. She has been there for more than ten years. It is not surprising that she resists changing her sales process to align more with the consultative sales direction that has been adopted by the organization—she receives too much commission for ignoring it.

Other Sales Professionals in the organization have developed the notion that Theresa is allowed to play by different rules than the rest, due to her high sales levels. This is de-motivating to them—feeling that it is not a level playing field. They also feel that she is “cherry-picking,” raiding Loot for leads that should be available equally among salespeople. Sales managers report that “conspiracy theories abound,” often without real basis. The salespeople sometimes misinterpret things that they observe. Theresa does access more Loot leads than other Sales Professionals, but there are a number of explanations for this. Part of it is that she handles more calls of all sorts, with more calls to Loot leads among them. Theresa has also become very good at multi-tasking—maximizing her time constantly. She is likely to be checking Loot leads between calls that are distributed by the system, while co-workers may be catching their breath or socializing between calls. The co-workers may also be spending more time per call, endeavoring to follow the company directive to be consultative.

Regardless of the explanations, Theresa is viewed as being separate and different from the rest of the sales team. She is viewed as a lone wolf, and that affects the organization.

DISCUSSION QUESTIONS

1. How can Nautilus keep Sales Professionals motivated to maintain a strong work ethic through the day-to-day grind?
2. How can the Sales Professionals be motivated to do more cross selling?
3. What can be done to help the Sales Professionals build stronger rapport, and perhaps relationships, with customers, and why is this important?

4. How should Theresa's sales results be viewed by her Supervisor and Sales Manager?
5. Considering that Nautilus wants to keep the other Sales Professionals motivated to use a consultative selling approach, what action should be taken in regard to Theresa and her methods?
6. If nothing changes in the way that Marketing creates leads, what can the sales organization itself do to improve the quality of leads?

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**INSTRUCTOR'S NOTES TO
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