

國立交通大學

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碩士論文

業務人員幫助行為之量表建立—以壽險業為例



**A Scale Development of Salespeople Helping
Behavior—A Case of the Life Insurance Industry**

研究生：張雅君

指導教授：張家齊 博士

中華民國九十七年六月

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研究生：張雅君

Student : Ia-Jiun Jang

指導教授：張家齊 博士

Advisor : Dr. Chia-Chi Chang

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中文摘要

業務人員與顧客在互動的過程中，會提供給顧客職責外的協助，也就是不計回報、額外提供的服務；而當業務人員與顧客互動的程度愈高，其提供職責外的協助會愈頻繁。本研究目的是將上述之幫助行為具體量化，透過量化研究，建立一套「業務人員的幫助行為」量表。本研究分成兩個階段，其受測者為壽險業的業務人員，分別有 144 位及 311 位參與。研究結果顯示，此量表的信度與效度表現良好，共包含十五個項目，以及四個層面：特殊協助、送禮及個人探訪、社交活動、情感支持。此外，由於本量表將抽象的協助具體地量化，形成一套標準的衡量模式，將有助於管理者在診斷及評估員工的表現。

關鍵字：業務人員的幫助行為、量表建立、職責外協助、量化研究

A Scale Development of Salespeople Helping Behavior—A Case of the Life Insurance Industry

Student : Ia-Jiun Jang

Advisors : Dr. Chia-Chi Chang

**Department of Management Science
National Chiao Tung University**

Abstract

During the interaction between salespeople and customers, salespeople will provide extra-role assistances for their customers regardless of reciprocation. The higher the degree of interaction is, the higher the frequency of extra-role assistance that salespeople engage in will be. The purpose of this study is to quantify this kind of helping behavior, and the research led to the development of a Salespeople Helping Behavior Scale (SHB Scale). The study was divided into two stages: all respondents were salespeople from life insurance industry, with 144 and 311 respondents involved each of the stages. The result showed that an SHB scale with in 15 items of four dimensions: assistance of specialty, gift giving & personal visit, social activity, and emotional support, could be reasonably constructed. Such a scale, which quantifies abstract helping behavior, can make it easier for managers to analyze SHB and thus evaluate employees.

Key words: salespeople helping behaviors, scale development, extra-role assistances, quantitative research

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民國 97 年於新竹交大管科

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Chapter 1 Introduction

1.1 Research Motivation and Background

According to Morgan and Hunt (1994), increasing customer satisfaction is a key strategy used by organizations to build long-term relationships with their customers. Hence, it is vital that managers should determine which means promote customer satisfaction. Previous research has found that salesperson behavior has a great impact on overall customer satisfaction (Grewal & Sharma 1991). An organization can influence customer satisfaction by increasing its salespeople's helping behaviors (Widmier 2002). In addition, helpful behaviors directed at customers is positively associated with sales performance (George 1991), is thus likely to lead to an indirect benefit to an organization's profits. Helping behaviors thus play an important role in organizations.

Helping behaviors can be considered as 'in-role behavior', behaviors that are formally required by an organization and is a part of an individual's role, and 'extra-role behavior', which are behaviors that are discretionary and not role prescribed (Brief & Motowidlo 1986; King et al. 2005). This study focused only on extra-role behaviors, especially salespeople helping behavior. Based on Chang's (2005) definition, salespeople helping behavior (SHB) is the extra-role behaviors that salespeople provide directed at their customers.

Although previous studies have discussed why salespeople have SHB, few studies have

considered measuring it. This research set out to develop an SHB scale as a standard way to measure such behavior.

1.2 Research Objectives

The object of this research project was to develop a scale for measuring SHB to determine if there was some value to measuring SHB, and whether a SHB scale could be differentiated from a Selling Orientation–Customer Orientation (SOCO) Scale, with which it may have shared some characteristics.

An item pool will be made for next step analysis. Experts will be asked to allocate these items into dimensions. And following step is sample collection and analysis. After analyze the reliability and validity, the SHB scale is established. To prove SHB scale is valuable, we will compare it with SOCO scale which shares some similar characteristics.

In this study, we want to figure out some research questions which are shown below:

1. Is this SHB scale valuable to measure SHB?
2. Can this SHB scale be differentiated form SOCO scale?

1.3 Thesis Structure

The research is recorded in five chapters as illustrated in Figure 1-1. Chapter 1

introduces background and motivation for the research. Chapter 2 covers a literature review of SHB and related research into helping behavior. Chapter 3 deals with the research methodology outlining the process of developing an SHB scale and testing its validity and reliability. Chapter 4 gives the result—the scale that was developed, and Chapter 5 discusses the results and their implications..

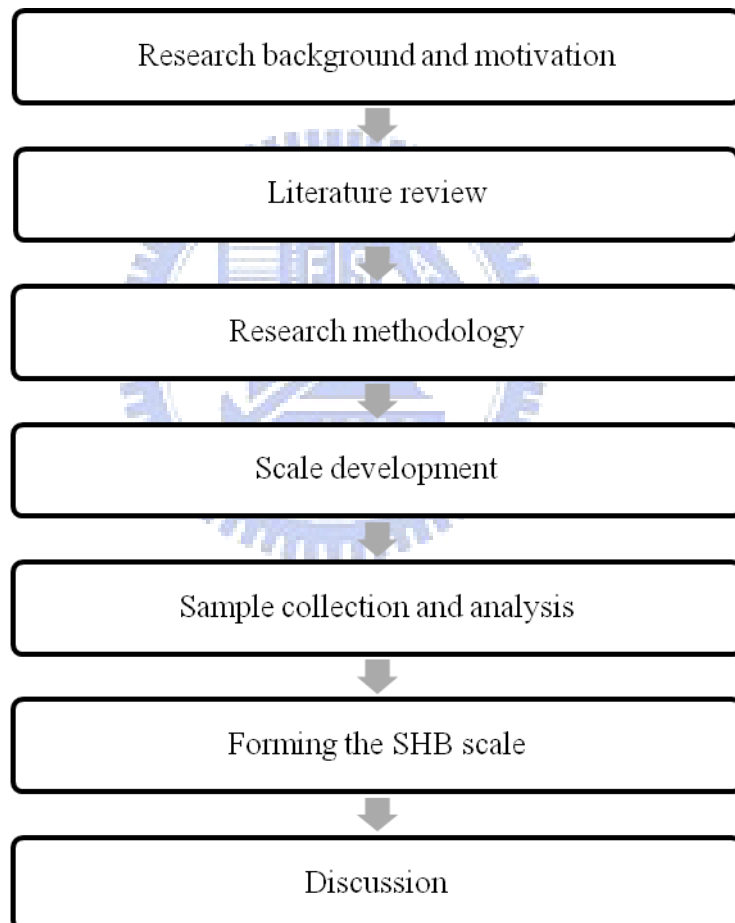


Figure 1-1: Research Flow

Chapter 2 Literature Review

Helping behavior such as Salespeople Helping Behavior (SHB) (Chang 2005; Cheng 2007), Organizational Citizenship Behavior (OCB) (Organ 1988; MacKenzie et al. 1993; Posdakoff & MacKenzie 1994; Netemeyer et al. 1997; Organ 1997), Prosocial Organization Behavior (POB) (Moss & Page 1972; Wispe 1972; Brief & Motowidlo 1986; George 1991), and Customer-Orientation Behavior (Saxe & Weitz 1982; Widmier 2002; Stock & Hoyer 2005) have all been discussed in previous research. They are all similar in concepts, yet are distinctive in particular ways.

In this chapter, I attempt to distinguish one from the other, and discuss each one's particular characteristics. I also probe what motivates people to engage in helping behavior, and why such behavior benefits an organization or its customers, and what factors influence helping behavior. Furthermore, each of the other helping behaviors is compared with SHB so as to gain a clearer understanding of what SHB is.

2.1 Organizational Citizenship Behavior (OCB) versus SHB

Both salespeople helping behavior (SHB) and OCB are extra-role behaviors which are not necessarily required by organizations. However, OCB is behavior which people act out toward co-workers and their own organizations, whereas SHB is exclusively

customer-oriented.

2.1.1 Definition of OCB

According to Posdakoff and MacKenzie (1994), organizational citizenship behavior (OCB) can be referred to as a salesperson's discretionary and extra-role behavior that would influence a manager's evaluation of their performance. OCB consists of those actions that *"contribute to the maintenance and enhancement of the social and psychological context that supports task performance."*(Organ, 1997, p.95). Additionally, OCB is not explicitly recognized by a formal organizational reward system (Organ 1988).

Since many researchers have given different definitions of OCB, Netemeyer et al. (1997, p.86) summed up some the key elements of OCB thus: *"(1) represent behaviors above and beyond those formally prescribed by an organization role, (2) are discretionary in nature, (3) are not directly or explicitly rewarded within the context of the organization's formal reward structure, and (4) are important for the effective and successful functioning of an organization"*.

Acts such as giving advice, helping new co-workers to solve work-related problems, helping design a presentation, sending a fax for another person, and providing work experiences to increase unit performance are OCBs (Netemeyer et al. 1997).

2.1.2 Consequences of OCB

Although OCB does not fit into an organization's reward system, it affects a manager's judgments. MacKenzie et al. (1993) noted that some OCB is even more important than sales productivity in determining sales managers' ratings of salespeople. In Podsakoff and MacKenzie's (1994) study, managers tend to rate some citizenship behavior higher when they assess employees' performance. This can benefit individuals such as giving them a better chance of being promoted, even though their job performance may not be the most outstanding. The reasons why managers evaluate OCB highly are: (1) an employee who helps co-workers to solve work-related problems will save the manager's time to do other things which may promote his own sales performance (the 'norm of reciprocity'); (2) distinctive information is most likely to be retained in memory, recalled and considered in the final evaluation, and (3) the behavior may just match managers' ideas of a "good salesperson".

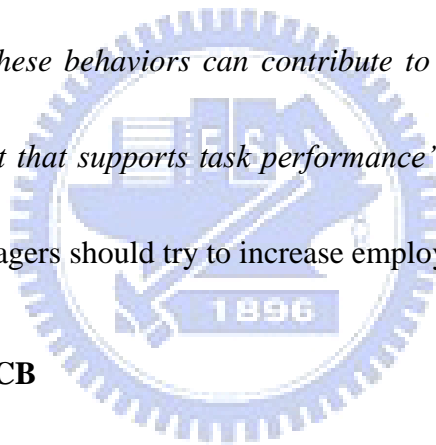
2.1.3 Taxonomy of OCB

OCB can be divided into categories, although different authors describe different categories. Organ's (1988), taxonomy of OCBs included five components: altruism, conscientiousness, sportsmanship, courtesy and civic virtue, while Podsakoff et al. (2000) research, OCB included seven: helping behavior, sportsmanship, organizational loyalty, organizational compliance, individual initiative, civic virtue, and staff development. And

George and Brief (1992) listed five forms of salesperson OCB: helping coworkers, protecting the organization, making constructive suggestions, developing oneself and spreading goodwill.

2.1.4 Values of OCB

OCBs are essential to an organization. People who consistently perform OCB such as helping colleagues to make sales, retain customers, and even increase customer satisfaction through superior service, contribute to an organization's long-term well-being (Netemeyer et al. 1997). In addition, *“these behaviors can contribute to maintain and enhance the social and psychological context that supports task performance”* (Organ, 1997, p.95). With all of the benefits of OCB, managers should try to increase employees' OCB.



2.1.5 Determinants of OCB

There are many factors that may affect the emergence of OCB. According to Netemeyer et al. (1997) research, there is a direct relationship between job satisfaction and OCB: the higher job satisfaction a person has, the more OCB he may exhibit. Job satisfaction may mediate the relationship between helping behaviors and situational factors, such as person-organization fit, leadership support, and fairness in reward allocation (Netemeyer et al. 1997). For example, without fairness in reward allocation, top salespeople may become dissatisfied, be less willing to stay a 'team player', and be less likely to exhibit OCB, which

detract from the performance of the team.

Furthermore, the characteristics of a sales job would affect OCB as well. ‘Outcome-based’ criteria such as sales volumes will decrease salespeople’s willingness to engage in OCB, for reason that the salespeople have to compete with each other for sales volume-related rewards. By contrast, ‘behavior-based’ criteria such as subjective evaluations (i.e., salesperson input in promising a ‘team concept’) might be more apt to engage in OCBs (Netemeyer et al. 1997).

2.1.6 Customer-Oriented OCB

Customer-Oriented OCB has been defined recently, and it is one of OCB. It means that employees engage in CO-OCB to help their colleagues provide better service to customer, and therefore benefit the organization (Dimitriades 2007). According to Dimitriades (2007), employees understand that it is critical to develop long –term relationship with customers and understand their needs. However, the exact behavior for a job description of how to interact with customers may not be listed. Hence, people exhibiting CO-OCB will assist the colleagues to better understand and enable them to deliver higher customer service (Gronoos 1985). Compared to SHB, they both are extra-role behaviors. However, people engaging in CO-OCB is to strive benefit for the organization, while people engaging in SHB is to seek customers’ welfare and may be inconsistent with the organization’s policies.

2.2 Prosocial Organization Behaviors (POB) versus SHB

In comparison with SHB, POB and SHB both exhibit extra-role behaviors and sometimes may act inconsistently with an organization's expectations. However, POB still has in-role behaviors while SHB does not. Besides, their objectives are different: POB is toward the organization and its members, whereas SHB is toward customers only.

2.2.1 Definition and Taxonomy of POB

Sorrentino and Rushton (1981) and Wispe (1972) defined prosocial behavior as behavior in which the actor expects that the person(s) towards whom it is directed will benefit. Also, *“POB is behavior which is (a) performed by a member of an organization, (b) directed toward an individual group, or organization with whom he or she interact while carrying out his or her organization role, and (c) performed with the intention of promoting the welfare of the individual, group, or organization toward which it is directed”* (Brief & Motowidlo, 1986, p. 711). POB can be divided into two dimensions: (1) altruism which includes prosocial acts toward individual co-worker and others, and (2) generalized compliance, which includes prosocial acts toward the organization (Smith et al. 1983). There are several important distinctions between different kinds of POB: (1) functional or dysfunctional behavior towards the organization, and (2) role prescribed or extra-role behavior. Based on Brief and Motowidlo's (1986) definition, role prescribed behaviors are a formal part of the individual's

role or job specified by organization. Extra-role prosocial behaviors are not a formal part of the job assigned to individuals.

Acts such as helping, sharing, donating, cooperating, and volunteering are forms of prosocial behavior. Brief and Motowidlo (1986) construct 13 kinds of POB, such as assisting co-workers with job-related or personal matters, providing services or products to consumers in organizationally inconsistent or consistent ways, putting in extra effort on the job, and so on.

2.2.2 POB versus OCB

POB and OCB are similar concepts. They are both oriented toward co-workers and the organization. In addition, some behaviors may sometimes be of advantage to colleagues but will not be to the organization's benefit. For example, a person may show his courtesy to cover up another colleague's mistake which might heavily influence the organization's sales performance. However, POB is still different from OCB: POB can include in-role behaviors, whereas OCB only emphasizes extra-role ones.

2.2.3 Consequences of POB

Katz (1964) described three behavioral patterns that were necessary for effective organizational functioning: (1) joining and staying in the organization, (2) meeting or exceeding specific standards of performance, and (3) behaviors that go beyond specified role

requirements. He thought the third one was specifically critical for an organization, and POB is one of the examples.

As mentioned above, POB brings some functional consequences, such as improving organizational efficiency, increasing job satisfaction and morale among persons, improving communication and coordination between individuals and units, and more. However, POB may have some potential dysfunctional consequences: ineffective job performance if people spend too much time in extra-role activities such as attending to the personal concerns of others at the expense of their own job activities.

2.2.4 Determinants of POB

According to previous research, many factors influence whether a person engages in POB. In the “personality concept”, Brief and Motowidlo (1986) found that people who have empathy and higher level of education would more often engage in POB. In contrast, people who are neurotic would act less so. Mood is another factor: people in positive mood exhibit more POB; people in negative mood exhibit more POB only when benefits exceed costs (Brief & Motowidlo 1986).

In the “situation concept”, Brief and Motowidlo (1986) summed up seven contextual factors which affect POB. (1) Social norms of reciprocity—people help those who have helped them at any time. (2) Role models—people who are role model have the effect of stimulating others around them to behave prosocially. (3) Reinforcement contingencies:

positive reinforcement promotes prosocial behavior (Moss & Page 1972). (4) Organization climate: an organization's climate affects its members' behavior because they try to adapt to the milieu to achieve some homogeneity with it (Schneider 1975). (5) Leadership style establishes some conditions for the operation of reciprocity norms. (6) Organizational stressors: post-exposure effects of stressors such as noise, electric shock and task load affect interpersonal sensitivity (Cohen 1980). (7) Cohesiveness: Hornstein (1976; 1978) argued that people as a group become more emotionally involved when a group member is in trouble and are more motivated to help him/her.

2.3 Customer orientation versus SHB

Customer orientation and SHB are both exclusively customer oriented. They are both helping behaviors which try to serve customers' need and build long-term relationships. For the sake of long-term customer satisfaction, they may sacrifice present benefits. However, customer orientation is in-role behavior which tries to serve customers' needs for products or services. SHBs are extra-role behaviors to satisfy customers which may go beyond salespeople's duties. Customer orientation and SHB share similar concepts, but they are still different. In this research, I will compare an SHB scale to the SOCO scale by analyzing discriminant validity.

2.3.1 Definition of Customer Orientation

Saxe and Weitz (1982, p.343) stated that customer orientation selling is “ *the ability of the salespeople to help their customers and the quality of the customer-salesperson relationship*”. This refers to the degree that salespeople use marketing concept to try to help their customers make purchase decisions that will satisfy customers’ needs (Saxe & Weitz 1982; Stock & Hoyer 2005).

Stock and Hoyer (2005) even provide a two-dimensional customer orientation framework of behavior and attitude. Customer-oriented behavior is defined as a salespeople’s ability to help their customers by displaying behaviors that increase customer satisfaction. Customer-oriented attitude is defined as a salesperson’s affect for or against customers. Compared to attitudes, behaviors are less stable because they are easily influenced by other element such as the firm’s action (Williams & Wiener 1996), the customers (Chonko et al. 1986), and the environment (Teas et al. 1979).

According to Sax and Weitz (1982), highly customer-oriented salespeople engage in behaviors aimed at increasing long-term customer satisfaction and avoid customer dissatisfaction. They also avoid actions with may increase the chance of an immediate sale, but which may sacrifice a customer’s interest.

Customer-orientation can include such things as discussing customers’ needs, helping customers to achieve their goals, and influencing customers’ decisions by providing

information rather than exerting pressure (Stock & Hoyer 2005).

2.3.2 Determinants of Customer Orientation

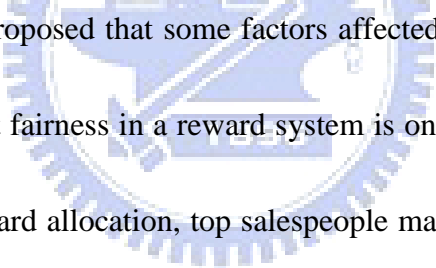
Customer satisfaction is essential to developing long-term relationships between customers and companies. To induce customer satisfaction, having customer-oriented salespeople is necessary for organizations: customer-orientation and customer satisfaction are positively related. This relationship is, however, moderated by some factors (Stock & Hoyer, 2005, pp541,542): (1) *Empathy—the ability to understand another person’s perspective and to react emotionally to the other person.* (2) *Reliability—a sense of duty toward meeting goals or the extent to which a salesperson makes sure that promised deadlines are met.* (3) *Restriction in job autonomy—the extent to which salespeople feel they are unable to make their own decisions in their job and to develop a solution for the customer.* (4) *Expertise—the presence of knowledge and the ability to fulfill the task.* While empathy, reliability and expertise may intensify the relationship, restriction in job autonomy, in contrast, may weaken the relationship. For example, salespeople with a high degree of expertise can respond to customers’ problems more efficiently and effectively than those who lack it. Another example is that if salespeople are restricted in job autonomy, they are limited in dealing with customer problems which might affect customers’ evaluation toward the firm and its employees (Stock & Hoyer 2005).

Furthermore, some personality traits and compensations have considerable influence on

deciding whether a person is customer oriented or not (Widmier 2002). Customer satisfaction incentives, self-monitoring, perspective-taking and empathic concern are all positively associated with customer orientation, whereas sales-based incentives have a negative relationship with customer orientation. Kelley and Hoffman (1997) concluded that employee positive affectivity is positively related to service quality and customer-oriented behaviors.

2.4 Possible Antecedents of SHB

2.4.1 Fairness in Reward System



Many studies have proposed that some factors affected extra-role behaviors. Netemeyer et al. (1997) suggested that fairness in a reward system is one of the influences on OCB. That is, without fairness in reward allocation, top salespeople may become dissatisfied and be less willing to carry out OCB. These authors also examined whether there was a significant and positive relationship between job satisfaction and OCB. If subjects are satisfied with their jobs, it would enhance their tendency towards OCB. Since OCB and SHB are both extra-role behaviors, we can infer that fairness in reward allocation within an organization, and job satisfaction may also affect SHB.

2.4.2 Organization's Climate

An organization's climate affects the behavior of its members because they tend to adapt

to it to achieve homogeneity with their environment (Schneider 1975). This can have implications for SHB. For example, in the life insurance industry, salespeople do such things as giving gifts, which is not required by their organization. However, due to the climate surrounding them, many salespeople will do so, even if it is beyond the call of duty (Cheng 2007).

2.4.3 Customers' Response

Customer response can affect SHB as well. Employees can become dismayed by complaining customers, which could adversely affect their future behavior (Piercy 1995). Hence, customer satisfaction ratings have a meaningful impact on employee morale and organizational climate for customer service (Ryan et al. 1996). Based on this point of view, we can predict that higher customer satisfaction will encourage salespeople to provide better service and exhibit SHB during the service provision process.

2.4.4 Commercial Friends

Salespeople may exhibit SHB toward their customers, especially in highly interactive industries such as life insurance and hair care industry (Price & Arnould 1999). Hence, developing a good relationship between salespeople and their customers is essential. In such highly interactive industries, customers and salespeople are more likely to make friends than merely participating in economic exchange. As commercial friends, they may provide social

support, self-disclosure and gift giving (Crosby et al. 1990; Price & Arnould 1998). Such behavior is SHB. We can predict that salespeople will engage in more SHB if they and their customers are in a relationship as commercial friends.

2.5 Mood

Regardless of which form of customer orientation behavior, OCB, POB or SHB, they are all helping behaviors which are affected by one factor—a salesperson's mood.

2.5.1 Positive Mood toward Helping Behaviors

The effect of positive mood on helping behavior has been demonstrated in many studies. For example, George (1991) suggested that positive mood at work was significantly and positively related with the performance of both extra-role and role-prescribed POB. In addition, Brief and Motowidlo (1986) proposed that mood is a factor to affect POB: people in a positive mood exhibit more POB.

Many scholars have tried to find out why a positive mood fosters helping behaviors. Two reasons have been suggested. First, people in a positive mood tend to look at things on the bright side. Fiske and Taylor (1991) pointed out that people in positive moods perceive and evaluate other people, events, situations, and objects more positively, enthusiastically and optimistically than when they are in neutral or negative moods. George (1998) also argued

that salespeople in positive mood provide higher service quality, because they perceive customers and sales opportunities more positively. They also recall additional positive material from memory when face to face with a customer in a sales encounter. Second, helping others helps people maintain their present positive moods. Clark and Isen (1982) and Isen et al. (1978) suggested that people in good moods are more helpful, because being helpful is self-reinforcing or enables them to maintain or prolong their positive mood. A similar concept has been mentioned by Carlson et al. (1988): helping behavior makes people feel good or tends to promote positive moods, and may actually be used to maintain a positive mood state.

2.5.2 Negative Moods toward Helping Behaviors

While positive moods foster helping behavior, negative moods can also engender helping behavior in some conditions. The reason why people in negative mood exhibit helping behavior is that negative mood states are aversive, and helping others is a way to relieve the feelings of aversion (Cialdini et al. 1973). In negative mood, whether a person engages in helping behaviors or not depends on the cost-benefit analysis. Unlike the consistent effect of positive mood states on helping, the influence of negative mood states on helping are various (Weyant 1978). When the benefits for helping overrun the costs, the perceived reward value for helping should be high. Hence, individuals would attempt to relieve a negative mood state by helping only if the benefits for helping are high and/or the costs for helping are low

(Piliavin et al. 1969). Brief and Motowidlo (1986) also found that mood affected POB: people in positive mood engage in more POB; people in negative mood have more POB only when benefits are larger than costs.

2.5.3 Positive Moods versus Negative Mood

Other studies have demonstrated the difference between positive and negative mood. Cialdini et al. (1973) argued that a U-shaped relationship exists between temporary mood state and helping: people in negative or positive mood may be more helpful than people in a neutral mood state. Besides, helping increases under conditions of temporary sadness because altruism, as a self-gratifier, serves to alleviate the depressed mood state. Altruism and self-gratification are thus equivalent operations, and Baumann et al. (1981) found that if a person was in a happy mood, altruistic activity did not cancel the tendency for self-gratification. Conversely, if a person was in a sad mood, altruistic activity canceled the tendency for self-gratification.

2.5.4 Consequences and Determinants of Positive Mood

As has been discussed above, positive mood is vital for the helping behavior, and it's one of the key points which influences organization's and salespeople's benefits. Salespeople's feelings have powerful effects on their behavior and determine how helpful they will be toward customers. If people are in a positive mood, they may exhibit SHB and thus provide

high quality customer satisfaction. George (1998, p.25) wrote that *“ongoing affective states or moods at work, regardless of their origin (customer service intension), influence the extents to which salespeople are helpful to customers and provide high quality customer service”*, and suggested some ways to promote salespeople’s positive moods. (1) Create a sense of competence, achievement and meaning; from Isen et al. (1987, p.1129) we have, *“the most important way of inducing good feelings may be allowing workers to achieve a sense competence, self-worth, and respect”*. (2) Provide reward and recognition: let salespeople know that their significant contributions to the organization are valuable and appreciated. (3) Create relative small work group or team sizes: small groups have longer and more frequent interpersonal exchanges, and feel larger emotional attachment to each other. (4) Instill positive moods in leaders: when leaders are in positive moods, they may give more support and display more concern for their subordinates.

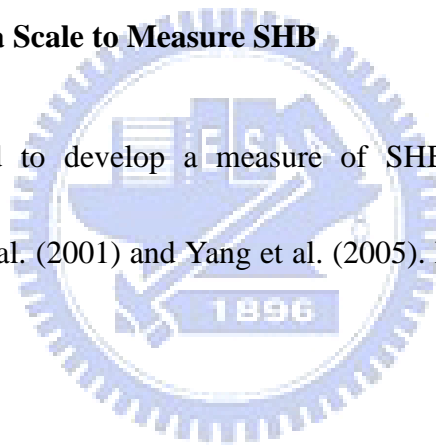
To sum up, we know each the different helping behaviors may benefit certain groups. Of them, customer-orientation behaviors and SHB are both exclusively oriented toward customers. Since there is a standard way to measure customer-orientation behaviors, the SOCO Scale, a standard method to measure SHB would be very valuable. The focus of this research was thus on SHB and on developing a way of distinguishing it from customer-orientation behaviors, by being able to measure it on a scale, which is termed the SHB Scale.

Chapter 3 Research Methodology

This chapter explains how the SHB Scale was developed, including item development, item selection, sampling and measurement. Such a quantitative research approach was suggested for several studies (Churchill 1979; Saxe & Weitz 1982; Parasuraman et al. 1988; Tian et al. 2001; Parasuraman et al. 2005; Yang et al. 2005).

3.1 Steps in Developing a Scale to Measure SHB

The procedure used to develop a measure of SHB largely follows the guidelines recommended by Tian et al. (2001) and Yang et al. (2005). Figure 3-1 showed the process we developed the SHB scale.



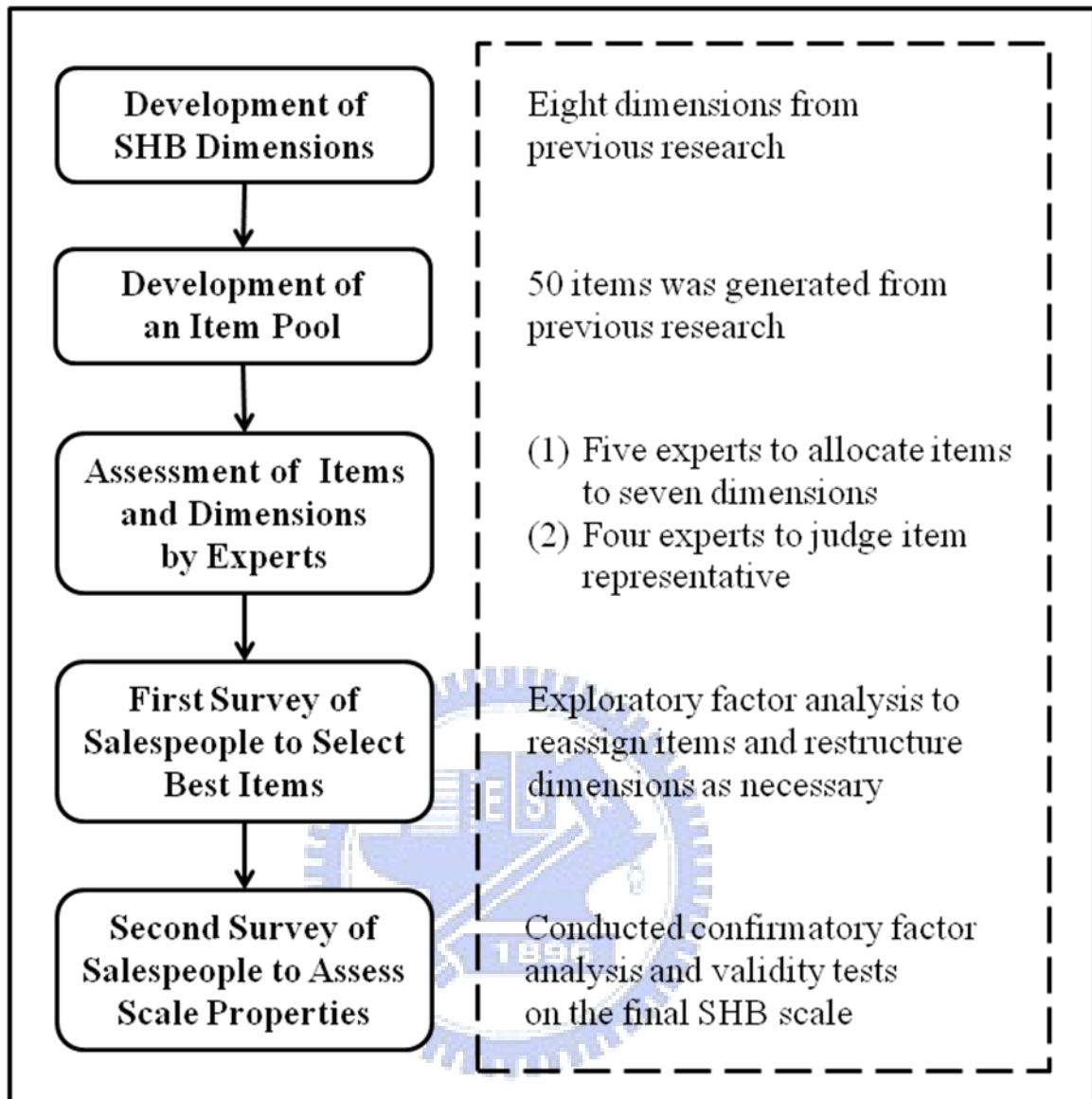


Figure 3-1: Process for Developing the SHB Scale

3.2 Dimension Development

With reference to the context of interviews used in earlier research (Cheng 2007), SHB can be divided into eight dimensions. SHB can be divided into eight dimensions: (1) Assistancess of insurance-unrelated specialties, (2) Insurance-related services, (3) Gift giving, (4) Social activities, (5) Information sharing, (6) Emotional support, (7) Networking

assistance, and (8) Others.

3.3 Item Development

The initial pool of 50 items was generated as in the research of Cheng (2007), and the selecting process followed Tian et al. (2001). Five experts who have years working experiences in the life insurance industry were given the definition of SHB and each dimension. They had to allocate each item to one of the eight dimensions or to a “not applicable” category. After eliminating items that could not be placed in an appropriate category by more than three experts, 33 items remained and only 7 dimensions left (“Assistance of Insurance-Unrelated Specialty”, “Insurance-Related Services”, “Gift Giving”, “Social Activities”, “Information Sharing”, “Emotional Support”, and “Networking Assistance”).

Next, four other experts who also have years working experiences in the life insurance industry were asked to rate each of the remaining items as being clearly representative, somewhat representative, or not representative of the particular dimension. Items evaluated as “clearly representative” by three experts and no worse than “somewhat representative” by the other experts were retained. Therefore, 31 items remained in this step. This process developed the initiate SHB scale which would be used for the respondents of the first survey. A seven-point scale anchored by “extremely agree” and “extremely disagree” was used for response (see Figure 3-2).

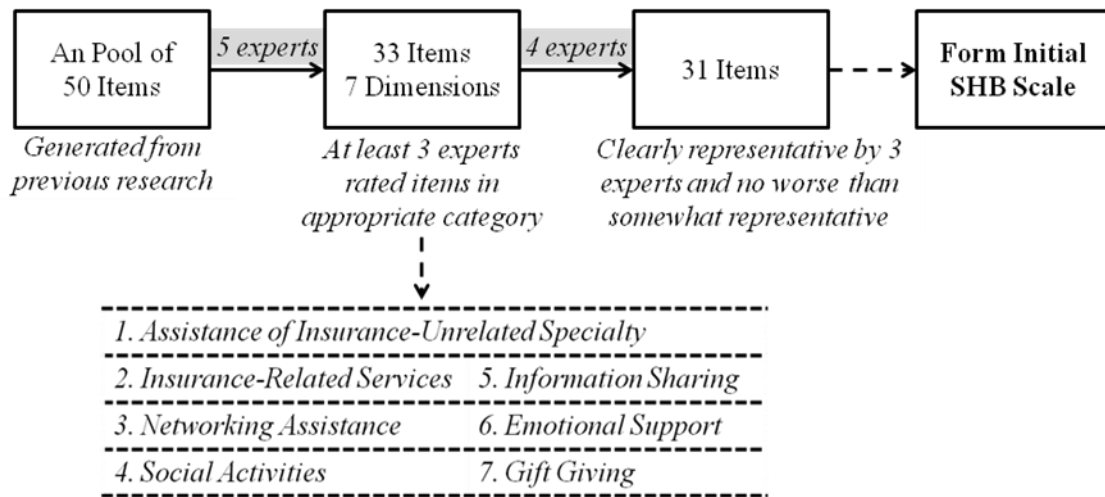


Figure 3-2: Process in Item Development

3.4 Sample Selection

The participants used were all salespeople in the life insurance industry. The life insurance industry was focused on was because it has highly interactive service delivery processes, and might reveal SHB during these service processes.

In the process of developing the scale, it was necessary to collect two sets of samples. In the first survey, an exploratory factor analysis was run to reassign items and restructure dimensions if necessary. In the second survey, a confirmatory factor analysis was run from which to construct the finale SHB scale.

The first sample consisted of 150 people, of whom 144 were usable (58 males and 86 females); more than 56% of the respondents had an income of NT\$500,000-2,000,000 p.a.; 55.55% were between 30-50 years of age, 68.75% had less than 10 years working experiences

as an insurance salesperson, and 60.42% had been in the present company for less than 6 years (see Table 3-1).

The second sample consisted of 333 salespeople, and 311 of the respondents were usable (117 males and 194 females). Over 53% of them had an income of NT\$500,000-2,000,000 p.a.; 72.99% were between 20-40 years old; 68.49% had less than 6 years working experiences as an insurance salesperson, and 75.56% of the respondents had worked in their present company less than 6 years (see Table 3-2).



Table 3-1: Frequency Table – First Survey

Demographics	Category	Frequency	Percent (%)
Sex	Male	58	40.28
	Female	86	59.72
Age	≤ 30	50	34.72
	31-40	46	31.94
	41-50	34	23.61
	≥ 51	14	9.72
Education	High School	49	34.03
	Bachelor	87	60.42
	Master and above	4	2.78
Overall Working Experiences	≤ 10	70	48.61
	11-20	48	33.33
	≥ 26	25	17.36
Working Experiences in Insurance Industry	≤ 10	99	68.75
	11-20	35	24.31
	≥ 21	9	6.25
Working Years in the Present Company	≤ 6	87	60.42
	7-15	38	26.39
	≥ 16	17	11.81
Income Per Year	≤ 500,000	47	32.64
	500,001-1,000,000	54	37.5
	1,000,001-2,000,000	27	18.75
	≥ 2,000,001	14	9.72
Sales Performance Per Year	≤ 1,000,000	82	56.94
	1,000,001-2,000,000	20	13.89
	2,000,001-3,000,000	20	13.89
	≥ 3,000,001	17	11.81

Table 3-2: Frequency Table – Second Survey

Demographics	Category	Frequency	Percent (%)
Sex	Male	117	37.62
	Female	194	63.38
Age	21-30	142	45.66
	31-40	85	27.33
	41-50	37	11.90
	≥ 51	13	4.18
Education	High School	87	27.97
	Bachelor	209	67.20
	Master and above	13	4.18
Overall Working Experiences	≤ 10	198	63.67
	11-20	77	24.76
	≥ 21	33	10.61
Working Experiences in Insurance Industry	≤ 6	213	68.49
	7-15	75	24.12
	≥ 16	20	6.43
Working Years in the Present Company	≤ 6	235	75.56
	7-15	62	19.94
	≥ 16	13	4.18
Income Per Year	≤ 500,000	120	38.59
	500,001-1,000,000	107	34.41
	1,000,001-2,000,000	60	19.29
	≥ 2,000,001	17	5.47
Sales Performance Per Year	≤ 1,000,000	211	67.85
	1,000,001-2,000,000	51	16.40
	2,000,001-3,000,000	12	3.86
	≥ 3,000,001	22	7.07

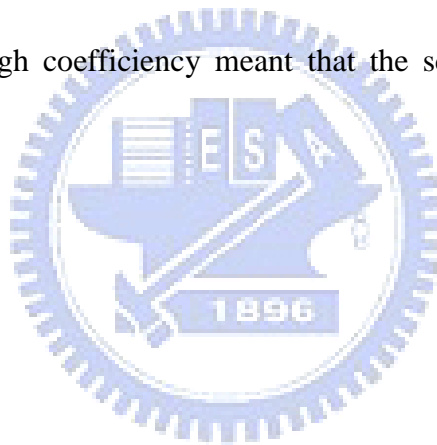
3.5 Item Refinement

The purpose of this process was to reassign items and restructure dimensions as necessary. Through the exploratory factor analysis of the first survey, items with a loading value on any factor of below 0.5, or high cross-loadings on two or more factors, could be

eliminated, and dimension appropriateness could also be examined. In order to test the factor structure more rigorously, the second survey was used to conduct a confirmatory factor analysis, followed by deleting items with loadings of less than 0.5. This process would form the final SHB scale.

3.6 Reliability Analysis

Internal consistency reliability is used to analyze whether the context was homogeneous, stable and consistent. High coefficient meant that the scale had a high level of internal consistency.



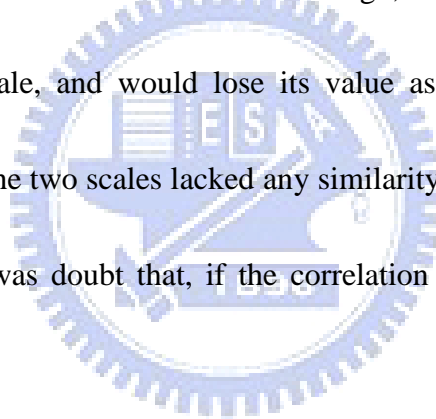
3.7 Validity Analysis

Several steps were taken to test and make sure the completeness of SHB scale.

First, to check if the respondents were affected by social desirability, the respondents in the first survey had to complete a short form with the Marlowe-Crowne Social Desirability scale (Crowne & Marlowe 1960), the reliability of which was well demonstrated by Ray (1984).

Second, discriminant validity was evaluated in the first survey to compare the SHB scale with the Selling Orientation-Customer Orientation (SOCO) Scale. SOCO refers to the

degree to which salespeople practice marketing concepts by trying to help their customers make purchase decisions that will satisfy customer needs (Saxe & Weitz 1982). Both scales are based on similar concepts: salespeople trying to help their customers so as to increase customer satisfaction. However SOCO focuses on salespeople's in-role jobs that offer suitable services or products to customers, using their professional knowledge, while SHB focuses on salespeople's extra-role behaviors that try to serve customers' needs but may not be role-prescribed. Because of their similarities and differences, correlation would be expected not too high nor too low. If the correlation was too high, it meant that the SHB scale was too similar to the SOCO Scale, and would lose its value as a new scale. In contrast, if the correlation was too low, the two scales lacked any similarity. And, because of the similarity of the two concepts, there was doubt that, if the correlation was too low, the SHB scale had inherent problems.



Chapter 4 Data Analysis

4.1 Item Selection

The overall process in selecting items is shown in Figure 4-1, with the steps that have to be carried out in order to form the final SHB scale.

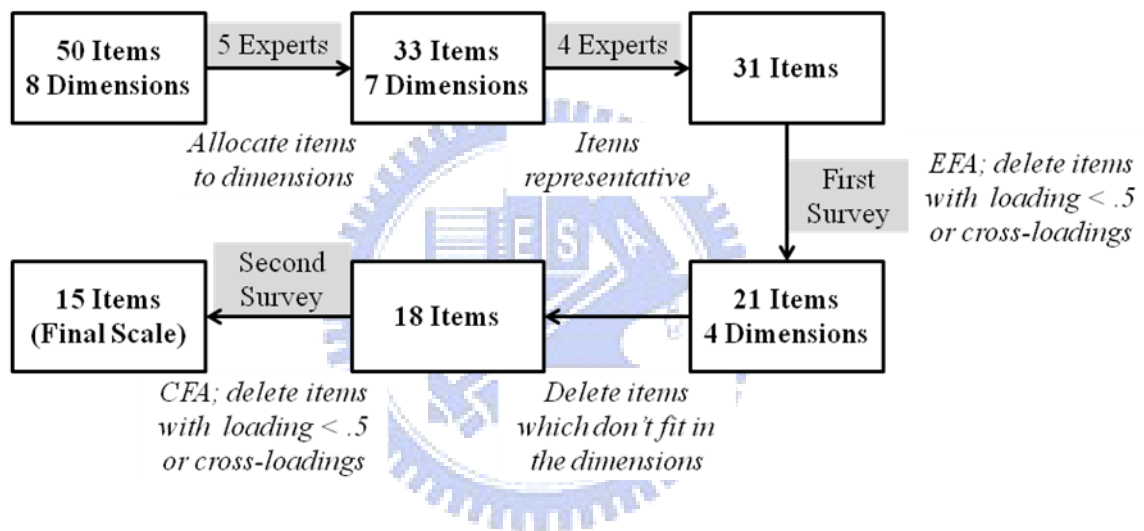


Figure 4-1: Process in Selecting Items

4.1.1 Exploratory Factor Analysis

To identify the major dimensions of SHB, principal component factor analysis with a varimax rotation was applied to the results of the first sample. The analysis extracted four factors, which were then taken through a series of iteration, each involved elimination of items with a loading on any factor of less than 0.5, or high cross-loadings on two or more

factors. Factor analysis was then performed on the remaining items. This iterative process resulted in the SHB scale, consisting of 21 items in four dimensions, which were labeled as follows (see Table 4-1):

- (1) Assistance of Specialty: A salesperson uses his own professional or special skills to solve a customer's specific problems.
- (2) Gift Giving and Personal Visit: a salesperson shows concern for the needs or feelings of a customer by sending gift or visiting.
- (3) Social Activities: Through the interaction on some occasions, a salesperson assists the customer's demand.
- (4) Emotional Support: A salesperson helps a customer deal with the emotions or offers encouragement and comfort while the customer needs.

Because some items did not fit well in any of the dimensions, I deleted the following three items to make each dimension more reasonable.

- (1) I call my customers and talk about job-unrelated topics to show my concern.
- (2) I care about customers voluntarily when they are down.
- (3) I am willing to help with a customers' job problems if they need.

Table 4-1: Comparison

Origin	EFA
<p>Insurance-Related Services</p> <p>I will justify customers' original products or services according to their needs; even doing so doesn't benefit me.</p> <p>If my customers want to buy other firms' products or services, I will still help them to analyze and choose.</p>	<p>Assistance of Specialty</p> <p>I will justify customers' original products or services according to their needs; even doing so doesn't benefit me.</p> <p>If my customers want to buy other firms' products or services, I will still help them to analyze and choose.</p>
<p>Networking Assistance</p> <p>I provide job-unrelated assistance to my customers through my social network.</p> <p>I will help customers to get contact if they have demands among themselves.</p>	<p>I provide job-unrelated assistance to my customers through my social network.</p> <p>I will help customers to get contact if they have demands among themselves.</p>
<p>Assistance of Insurance-Unrelated Specialty</p> <p>I will help to solve customers' problem which I am good at or have studied even this is unrelated to my job</p> <p>I provide customers with professional information which is unrelated to my job.</p> <p><i>I am willing to help with a customers' job problems if they need.</i></p> <p><i>I will give a talk when a customer invites me to do so; even though it is unrelated to my job.</i></p>	<p>I will help to solve customers' problem which I am good at or have studied even this is unrelated to my job</p> <p>I provide customers with professional information which is unrelated to my job.</p> <p>I call my customers and talk about job-unrelated topics to show my concern.* (Emotional support)</p> <p>I care about customers voluntarily when they are down.* (Emotional support)</p>
<p>Gift Giving</p> <p>When I visit other places I will bring some souvenirs which the customers like back for them.</p> <p>I will take something to visit a customer when I know he is sick in the hospital.</p> <p>I pay attention on selecting gifts which customers may needs on the special time of a year.</p>	<p>Gift Giving & Personal Visit</p> <p>When I visit other places I will bring some souvenirs which the customers like back for them.</p> <p>I will take something to visit a customer when I know he is sick in the hospital.</p> <p>I pay attention on selecting gifts which customers may needs on the special time of a year.</p> <p>I will remind customers about their important dates. (Social activities)</p> <p>I visit customers to show my concern. (Emotional support)</p>

Social Activities

I hold some activities to strengthen my relationship with customers.

I will attend social activities which my customers invite me.

I remember dates which are related to a customer and do something in the name of him.

I will remind customers about their important dates.

Social Activities

I hold some activities to strengthen my relationship with customers.

I will attend social activities which my customers invite me.

I remember dates which are related to a customer and do something in the name of him.

I will give a talk when a customer invites me to do so; even though it is unrelated to my job. *(Assistance of insurance-unrelated specialty)*

I will deal with a customer's family emergency when he cannot show up in time.
(Emotional support)

Emotional Support

I will play a consulting role for a customer when he has relationship problems.

I am willing to play a communication role within the customer's family if he needs.

I call my customers and talk about job-unrelated topics to show my concern.

I visit customers to show my concern.

I care about customers voluntarily when they are down.

I will deal with a customer's family emergency when he cannot show up in time.

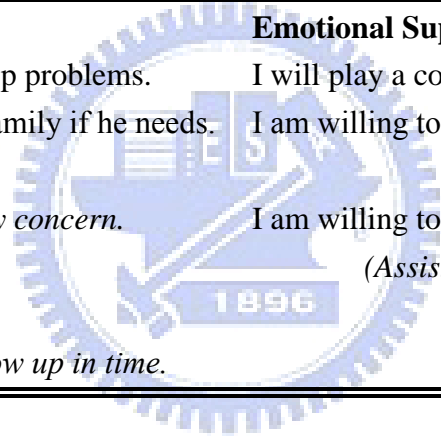
Emotional Support

I will play a consulting role for a customer when he has relationship problems.

I am willing to play a communication role within the customer's family if he needs.

I am willing to help with a customers' job problems if they need.*

(Assistance of insurance-unrelated specialty)



Note: (*) Items were deleted in the second survey.

Table 4-2: Exploratory Factor Analysis

Item number	Experts' rating	Dimensions and Items	Factors			
			1	2	3	4
Assistance of Specialty						
04	0.75	I provide customers with professional information which is unrelated to my job.	.681			
05	1.00	I provide job-unrelated assistance to my customers through my social network.	.807			
06	0.75	I call my customers and talk about job-unrelated topics to show my concern.*	.630			
10	1.00	If my customers want to buy other firms' products or services, I will still help them to analyze and choose.	.636			
11	1.00	I will help customers to get contact if they have demands among themselves.	.620			
16	1.00	I will help to solve customers' problem which I am good at or have studied even this is unrelated to my job	.611			
18	1.00	I will justify customers' original products or services according to their needs; even doing so doesn't benefit me.	.548			
22	1.00	I care about customers voluntarily when they are down.*	.652			
Gift Giving & Personal Visit						
01	0.75	I will remind customers about their important dates.*		.752		
14	0.75	I will take something to visit a customer when I know he is sick in the hospital.*		.563		
28	1.00	I visit customers to show my concern.		.593		
29	1.00	When I visit other places I will bring some souvenirs which the customers like back for them.		.743		
30	1.00	I pay attention on selecting gifts which customers may needs on special the time of a year.		.756		
Social Activities						
08	1.00	I hold some activities to strengthen my relationship with customers.*			.627	
13	0.75	I will deal with a customer's family emergency when he cannot show up in time.			.687	
24	1.00	I will give a talk when a customer invites me to do so; even though it is unrelated to my job.			.646	
25	1.00	I will attend social activities which my customers invite me.			.690	
27	0.75	I remember dates which are related to a customer and do something in the name of him.			.594	
Emotional Support						
15	0.75	I will play a consulting role for a customer when he has relationship problems.				.838
17	1.00	I am willing to play a communication role within the customer's family if he needs.				.826
19	0.75	I am willing to help with a customers' job problems if they need.*				.686

Note: Extraction method: principal component analysis. Rotation method: Varimax with Kaiser normalization. (*) Items were deleted in the final scale.

We can look at Figure 4-2 for the overall process:

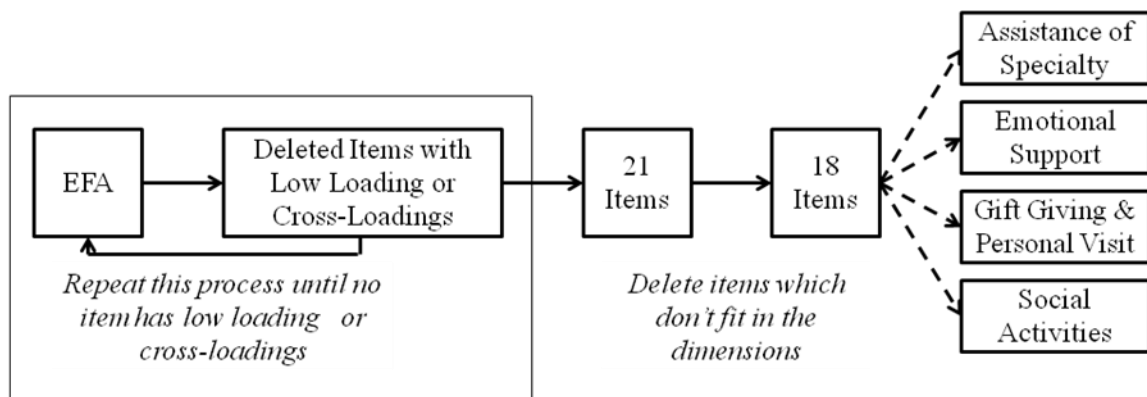


Figure 4-2: Process for Exploratory Factor Analysis

4.1.2 Confirmatory factor analysis

In order to test the factor structure more rigorously, a confirmatory factor analysis was conducted, using the second sample; the overall process is shown in Figure 4-3.

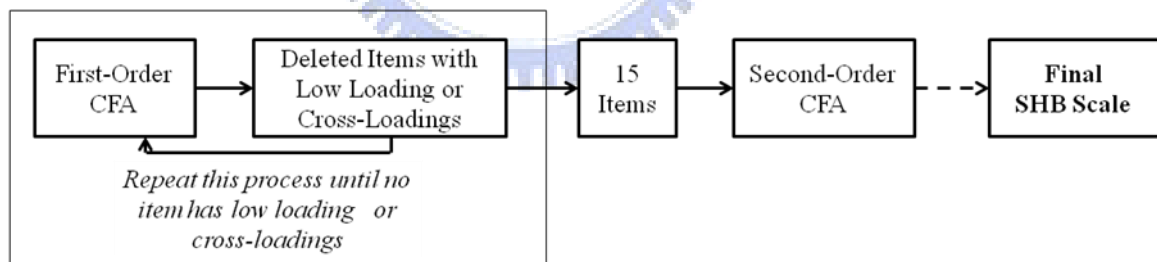


Figure 4-3: Process for Confirmatory Factor Analysis

A first-order measurement model was first tested, and showed a reasonable model fit with a ratio of Chi-square to degrees of freedom of 2.87, RMSEA of 0.078, CFI of 0.96, NNFI of 0.95, and GFI of 0.88 (see Table 4-3).

Table 4-3: Indices of CFA

Index	Suggested Standard	First-order CFA	Revised First-Order CFA	Second-order CFA
χ^2/df	2 - 4	2.87	2.32	2.31
GFI (Goodness of Fit Index)	> 0.9	0.88	0.92	0.92
AGFI (Adjusted Goodness of Fit Index)	> 0.9	0.84	0.89	0.89
NFI (Normed Fit Index)	> 0.9	0.94	0.95	0.95
NNFI (Non-Normed Fit Index)	> 0.9	0.95	0.96	0.97
CFI (Comparative Fit Index)	> 0.9	0.96	0.97	0.97
RFI (Relative Fit Index)	> 0.9	0.92	0.94	0.94
RMSEA (Root Mean Square Error of Approx.)	< 0.05 well 0.05-0.08 mediate 0.08-0.10 mild	0.078	0.065	0.065

However, CFA found three items to be inappropriate because of their low loadings (value below 0.05):

- (1) I will remind customers about their important dates (0.46).
- (2) I will take something to visit a customer when I know he is sick in the hospital (0.49).
- (3) I hold some activities to strengthen my relationship with customers (0.46).

The overall fit of the model was significantly improved (Chi-square to degrees of

freedom ratio dropped to 2.32, and GFI of 0.92 reached the ideal value) after the three items had been removed. Accordingly, the three items were deleted and only 15 items remained. The revised first-order measurement model showed an excellent fit, with a ratio of Chi-square to degrees of freedom of 2.32, RMSEA of 0.065, CFI of 0.97, NNFI of 0.96, and GFI of 0.92 (see Table 4-3). And the loadings were between 0.54 and 0.84 (see Table 4-4). In addition, the correlations among each dimension were shown in Figure 4-4:

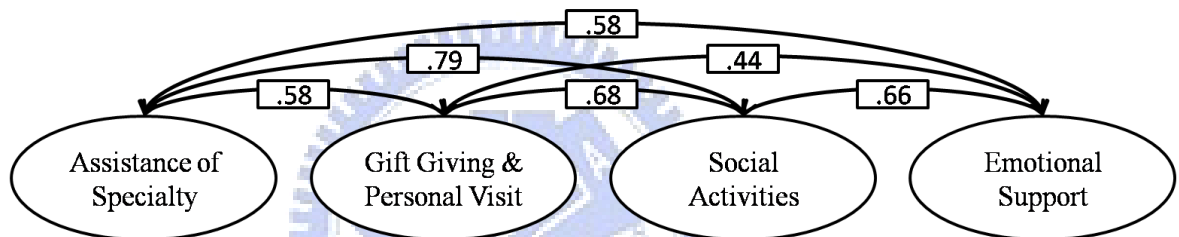


Figure 4-4: The Correlations among Each Dimension

Second-order CFAs were also run so as to model the latent first-order dimensions as reflective indicators of the second-order overall SHB construct. The model exhibited an excellent model fit, with a ratio of Chi-square to degrees of freedom of 2.32, RMSEA of 0.065, CFI of 0.97, NNFI of 0.97, and GFI of 0.92 and all four first-order factors loaded on the second-order factor strongly (> 0.68) (see Figure 4-5).

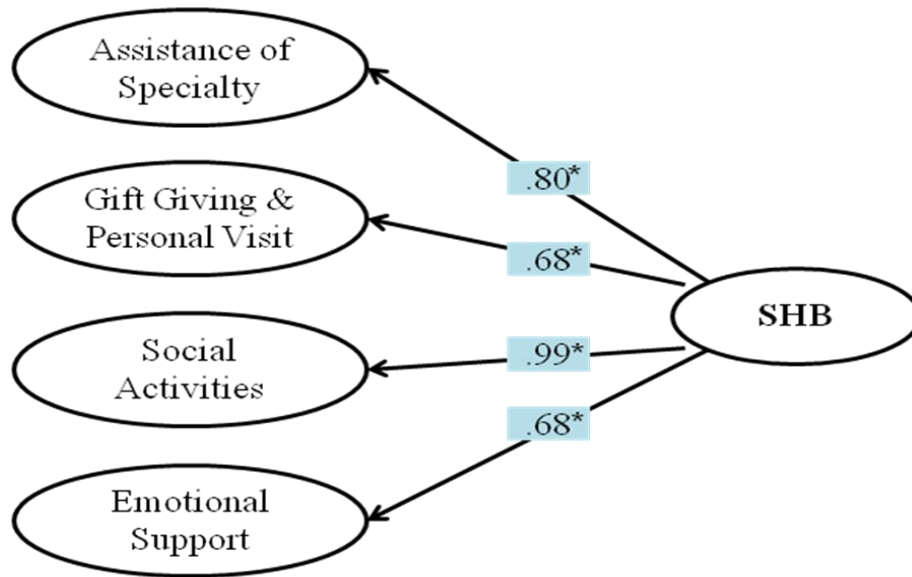


Figure 4-5: The Second-Order Measurement Model

Note: * $p < 0.001$



Table 4-4: The Revised First-Order Confirmatory Factor Analysis

Factor and item	Loading
Assistance of Specialty	
I provide customers with professional information which is unrelated to my job.	.66
I provide job-unrelated assistance to my customers through my social network.	.74
If my customers want to buy other firms' products or services, I will still help them to analyze and choose.	.67
I will help customers to get contact if they have demands among themselves.	.72
I will help to solve customers' problem which I am good at or have studied even this is unrelated to my job	.65
I will justify customers' original products or services according to their needs; even doing so doesn't benefit me.	.69
Gift Giving & Personal Visit	
I visit customers to show my concern.	.58
When I visit other places I will bring some souvenirs which the customers like back for them.	.84
I pay attention on selecting gifts which customers may needs on special the special time of a year.	.75
Social Activities	
I will deal with a customer's family emergency when he cannot show up in time.	.58
I will give a talk when a customer invites me to do so; even though it is unrelated to my job.	.78
I will attend social activities which my customers invite me.	.72
I remember dates which are related to a customer and do something in the name of him.	.60
Emotional Support	
I will play a consulting role for a customer when he has relationship problems.	.54
I am willing to play a communication role within the customer's family if he needs.	.84

4.2 Reliability Test

A coefficient alpha (Cronbach 1951) of 0.88 for the second sample indicated that the SHB scale had a high level of internal consistency (see Table 4-5).

Table 4-5: Reliability

Reliability Statistics		Cronbach's Alpha	N of Items
Over all SHB	SHB	0.883	15
Dimension 1	Assistance of Specialty	0.841	6
Dimension 2	Gift Giving & Personal Visit	0.753	3
Dimension 3	Social Activities	0.754	4
Dimension 4	Emotional Support	0.619	2

4.3 Test for Response Bias

The potential of confounding responses to the SHB scale as a result of social desirability response bias was assessed by using the Marlowe-Crowne (MC) socially desirable response scale (Crowne & Marlowe 1960). Social desirability response (SDR) is a measure of whether respondents are prone to create a particular impression, which is a kind of response bias. This bias may occur because respondents answer questions according to what they think the most acceptable to society, instead of what they really think. A self-report scale or psychological test should not have a significant response bias, or it may influence validity of the scale

(Borkenau & Amelang 1985). Hence, the lower the correlation between a newly development scale and the socially desirable response scale is, the better the newly developed scale will be.

This assessment was conducted with the first sample. Although the SHB scale was significantly correlated with the Marlowe-Crowne socially desirable response scale, the correlation was not high ($r = 0.207$, $p < .005$) (see Table 4-6). Therefore, it indicated that socially desirable responding may not have affected the scale’s validity too much. However, there was still concern about a possible social desirability response bias when SHB scale was used.

Table 4-6: Correlations with SHB Scale

	SOCO Scale	MC Socially Desirable Response Scale
SHB Scale	.410**	.207**

*** . Correlation is significant at the 0.01 level*

4.4 Discriminant Validity

Discriminant validity was evaluated using responses to the SOCO Scale which is similar but conceptually distinct from a SHB scale. As mentioned earlier, SHB and SOCO are both helping behaviors that are exclusively customer oriented. Salespeople engaging in SHB or customer-orientation try to serve customer needs and increase customer satisfaction. However,

while SHB mainly focuses on extra-role behaviors, SOCO focuses on in-role behaviors.

Hence, it was conjectured that the correlation would be neither extremely high nor low.

Using the first sample of 144 salespeople, SHB showed a moderate positive correlation with SOCO ($r = 0.41, p < .001$) (see Table 4-6) which support the new measure's discriminant validity.



Chapter 5 Conclusions

5.1 Results

This study was subject to a rigorous scale development procedure to establish an instrument that measures salespeople's extra-role assistances for their customers. The four dimensions—assistance of specialty, gift giving and personal visit, social activities, and emotional support—had a significant impact on overall SHB. By testing discriminant validity, I approved my conjecture that salespeople helping behavior and customer-orientation behavior are similar concepts but with particular differences. Statistics showed that the level of correlation was only moderate ($r = 0.41, p < .001$) which meant that salespeople engaging in high SHB are not necessarily highly customer-orientated. In the analysis of response bias, although the SHB scale had a low correlation with Marlowe-Crowne socially desirable response scale, the correlation was significant ($r = 0.207, p < .005$), which meant that response bias should be of concern when using the SHB scale in the future.

5.2 Managerial Implications

With this research I tried to determine whether there was any standard way to measure salespeople helping behavior. After a series of processes, a SHB scale to quantify

salespeople's extra-role assistance to their customers was finally developed. According to Morgan and Hunt (1994), increasing customer satisfaction is a key strategy for organizations to grow long-term relationships with their customers. An organization can further influence customer satisfaction by encouraging—and thereby increasing—its salespeople's helping behavior (Widmier 2002). Hence, by quantifying helping behavior, it should be easier to investigate. The 15 items across four factors can serve as a useful diagnostic tool for any organization. Managers can use this scale to measure employees' helping behavior, and then find ways to encourage employees to engage in more SHB, and thus enhance customer satisfaction.



5.3 Limitation of the Research

Every study has its limitations, and the main limitation of this one was that the respondents are all from a single industry, the life insurance industry. Any generalization of this SHB scale needs to be viewed with caution.

For this research, the survey was divided into two parts, each with 144 and 311 usable respondents respectively. However, considering of the scale's stability, much larger samples would have been preferable. This is thus deemed as the second limitation.

5.4 Future Research

The following process for future research may try to do causality and external validity to find out what may be affected by SHB such as organization's sales performance, salespeople's personal sales performance, customer satisfaction, etc. Also, SHB can be compared with other helping behavior such as OCB and POB to figure out which constructs are unique within SHB that cannot be measured or explained by other helping behavior, hence, strengthen the value of SHB. Researchers can further investigate organizational consequences of the unique constructs.

In addition, researchers can explore what factors affect salespeople helping behaviors, including organization climate, relationship with customers, personal characteristics, etc. Furthermore, the correlation between sales performance and SHB is also worthy of investigation. Finally, researchers can extend the research and collect data from different industries in order to make the SHB scale generally applicable. Those tasks can be accomplished by using this scale.

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Appendix A Select Item by Experts

業務人員常常在很多方面給予顧客們協助，有些是職務上的要求或規定，有些則是職責外的協助。本次研究主要在探討業務人員的幫助行為，首先，我們對此名詞下一個定義：它幫助的對象是顧客，而且屬於業務人員職責外的幫助行為。它與業務的業績不一定有直接相關，然而在很多情況下，業務人員的幫助行為會增加顧客的滿意度，有可能進而提升業績

我們將業務人員的幫助行為概括成八類，分別是：(1) 跟工作不相關的專業(或專長)協助、(2) 跟工作有關的協助、(3) 送禮、(4) 社交活動、(5) 資訊分享、(6) 情感支持、(7) 人際關係上的協助、(8) 其他。其中：

業務人員的幫助行為

---它幫助的對象是顧客，而且屬於業務人員職責外的幫助行為

- (1) 「跟工作不相關的專業協助」
---若顧客遇到跟你工作無關的問題，但你對這方面擅長，你願意提供的協助
- (2) 「跟工作有關的協助」
---排除職責上的要求或規定，如果顧客遇到跟你職業有關的問題，你願意提供的協助
- (3) 「送禮」
---除了公司規定，你願意送給顧客可能需要的事物之行為
- (4) 「社交活動」
---透過平日與顧客的交流，而可能發生的幫助行為
- (5) 「資訊分享」
---透過資訊的提供幫助顧客
- (6) 「情感支持」
---藉由情感上的交流，讓顧客獲得協助
- (7) 「人際關係上的協助」
---業務透過認識的人或管道，滿足顧客需求之行為
- (8) 「其他」
---不屬於以上七類，但也是業務人員的幫助行為之一者
- (9) 「非業務人員的幫助行為」
---該行為不屬於業務人員的幫助行為

我們希望身為受測者的你，根據平日與顧客互動的情況，填答以下各項敘述行為，並將各項行為歸類

	非常 不同 意	不 同 意	有 點 不 同 意	沒 意 見	有 點 同 意	同 意	非 常 同 意	屬 於
1. 如果顧客需要，我樂於扮演他和家人間的溝通橋樑	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
2. 當我獲知顧客生病住院，我會帶東西前往探望	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
3. 我會辦活動以增進和顧客間的關係	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
4. 當我去訪問顧客時，會觀察他的生活或工作環境，主動提供建議	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
5. 若顧客彼此有需要，我會安排聯絡	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
6. 當顧客碰到我有研究或擅長的問題時，雖然與我的職務無關，我仍會協助他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
7. 我會跟顧客分享生活經驗	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
8. 當顧客的家庭遇到緊急問題，而他無法及時出現，我會代他處理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
9. 我會用特殊優惠價幫顧客購買產品	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
10. 我會透過人際關係提供顧客業務外的協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
11. 當顧客缺乏其他產品或服務的相關資訊，我會透過人際關係找尋適合的人選協助他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
12. 我會為顧客爭取利益，即使有可能與公司的利益相衝突	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
13. 我會親手做些東西送給顧客	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
14. 雖然沒有被要求，我仍會在百忙之中盡快解決顧客的問題	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
15. 我會打電話關心客戶，聊些業務以外的事	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
16. 在特殊節日我會特別選購顧客可能需要的禮物	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
17. 我會舉辦團體聚會與顧客交流	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
18. 我會帶顧客一起出外旅遊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
19. 我會提供顧客跟我本業無關的專業資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
20. 我會探訪顧客以表示我的關心	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
21. 當我到外地時，我會買顧客喜歡的特產送他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
22. 當顧客面臨與我先前工作領域有關的問題時，我會幫他處理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
23. 我出國時，會幫顧客買他們指定的產品	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
24. 當顧客面臨感情問題時，我會專心傾聽	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
25. 我會參加顧客邀請我出席的社交場合	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
26. 我會記住跟顧客有關的節日，並以他的名義為他做點事	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
27. 我會盡力幫顧客爭取額外的利益	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
28. 我會跟客戶聊些他在意的事情	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
29. 如果我的顧客想買其他同業的產品或服務，我仍會協助他分析與選擇	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
30. 當顧客家裡有特殊喜事，我會送禮祝賀	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—

	非常 不同 意	不 同 意	有 點 不 同 意	沒 意 見	有 點 同 意	同 意	非 常 同 意	屬 於
31. 我會和顧客一起逛街購物	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
32. 當客戶處於低潮，我會主動給予關心	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
33. 我會主動提醒顧客可能忽略的權益	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
34. 若有需要，我願意幫忙處理顧客的業務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
35. 我會提供顧客跟我本業有關係的資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
36. 如果顧客沒有需要，我會建議他不要購買我的產品或服務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
37. 當顧客面臨事業瓶頸時，我會給予精神上的協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
38. 我會和顧客一起從事休閒活動	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
39. 即使不是我經手的業務，我仍會給予協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
40. 當顧客請我去做知識分享，即使跟我的職務無關， 我仍會答應他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
41. 就算沒有好處，我仍會根據顧客的需求， 調整原先的產品或服務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
42. 當顧客遇到我曾經歷過的問題，即使與我的職務無關， 我仍會主動協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
43. 當顧客或其家屬生病，除了探望之外，我還會提供其他協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
44. 當顧客面臨感情問題時，我會幫他做分析	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
45. 即使沒有被要求，我仍會在顧客購買產品或服務後， 持續提供相關的資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
46. 我會提醒顧客屬於他們的重要節日	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
47. 除了談業務之外，平時我會和顧客出外用餐以聯絡感情	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
48. 我會分類顧客的需求以提供相關的資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
49. 我會跟顧客分享日常資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—
50. 我願意提供顧客其他產品或服務的優惠的管道	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	—

Appendix B Item Representative by Experts

業務人員常常在很多方面給予顧客們協助，有些是職務上的要求或規定，有些則是職責外的協助。本次研究主要在探討業務人員的幫助行為，首先，我們對此名詞下一個定義：它幫助的對象是顧客，而且屬於業務人員職責外的幫助行為。它與業務的業績不一定有直接相關，然而在很多情況下，業務人員的幫助行為會增加顧客的滿意度，有可能進而提升業績

我們將業務人員的幫助行為概括成八類，分別是：(1) 跟工作不相關的專業(或專長)協助、(2) 跟工作有關的協助、(3) 送禮、(4) 社交活動、(5) 資訊分享、(6) 情感支持、(7) 人際關係上的協助、(8) 其他。其中：

業務人員的幫助行為

---它幫助的對象是顧客，而且屬於業務人員職責外的幫助行為

(10) 「跟工作不相關的專業協助」

---若顧客遇到跟你工作無關的問題，但你對這方面擅長，你願意提供的協助

(11) 「跟工作有關的協助」

---排除職責上的要求或規定，如果顧客遇到跟你職業有關的問題，你願意提供的協助

(12) 「送禮」

---除了公司規定，你願意送給顧客可能需要的事物之行為

(13) 「社交活動」

---透過平日與顧客的交流，而可能發生的幫助行為

(14) 「資訊分享」

---透過資訊的提供幫助顧客

(15) 「情感支持」

---藉由情感上的交流，讓顧客獲得協助

(16) 「人際關係上的協助」

---業務透過認識的人或管道，滿足顧客需求之行為

(17) 「其他」

---不屬於以上七類，但也是業務人員的幫助行為之一者

(18) 「非業務人員的幫助行為」

---該行為不屬於業務人員的幫助行為

我們希望身為受測者的你，根據平日與顧客互動的情況，填答以下各項敘述行為，並圈選各項行為在該分類下的代表性程度

不具代表：1

有點代表：2

清楚代表：3

非常不同意	不同意	有點不同意	沒意見	有點同意	同意	非常同意	代表性
-------	-----	-------	-----	------	----	------	-----

跟工作不相關的專業(或專長)協助

- | | | | | | | | | |
|--------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 當顧客碰到我研究過或擅長的問題時，雖然與我的職務無關，我仍會協助他 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 若有需要，我願意幫忙處理顧客的業務 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 我會提供顧客跟我本業無關的專業資訊 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 4. 當顧客請我去做知識分享，即使跟我的職務無關，我仍會答應他 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

跟工作有關的協助

- | | | | | | | | | |
|-----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 雖然沒有被要求，我仍會在百忙之中盡快解決顧客的問題 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 就算沒有好處，我仍會根據顧客的需求，調整原先的產品或服務 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 即使不是我經手的業務，我仍會給予協助 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 4. 如果我的顧客想買其他同業的產品或服務，我仍會協助他分析與選擇 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

送禮

- | | | | | | | | | |
|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 當我到外地時，我會買顧客喜歡的特產送他 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 當我獲知顧客生病住院，我會帶東西前往探望 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 在特殊節日我會特別選購顧客可能需要的禮物 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 4. 當顧客家裡有喜事，我會送禮祝賀 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

社交活動

- | | | | | | | | | |
|-----------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 除了談業務之外，平時我會和顧客出外用餐以聯絡感情 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 我會辦活動以增進和顧客間的關係 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 我會參加顧客邀請我出席的社交場合 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 4. 我會記住跟顧客有關的節日，並以他的名義為他做點事 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 5. 我會提醒顧客屬於他們的重要節日 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

資訊分享

- | | | | | | | | | |
|----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 我會跟顧客分享日常資訊 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 我會提供顧客跟我本業有關係的資訊 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 我會分類顧客的需求以提供相關的資訊 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

非常不同意	不同意	有點不同意	沒意見	有點同意	同意	非常同意	代表性
-------	-----	-------	-----	------	----	------	-----

情感支持

- | | | | | | | | | |
|----------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 我會打電話關心客戶，聊些業務以外的事 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 我會探訪顧客以表示我的關心 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 3. 當客戶處於低潮，我會主動給予關心 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 4. 當顧客面臨感情問題時，我會幫他做分析 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 5. 當顧客面臨感情問題時，我會專心傾聽 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 6. 當顧客或其家屬生病，除了探望之外，我還會提供其他協助 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 7. 當顧客面臨事業瓶頸時，我會給予精神上的協助 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 8. 如果顧客需要，我樂於扮演他和家人間的溝通橋樑 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 9. 當顧客的家庭遇到緊急問題，而他無法及時出現，當我會代他處理 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |

人際關係上的協助

- | | | | | | | | | |
|-----------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| 1. 我會透過人際關係提供顧客業務外的協助 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |
| 2. 若顧客彼此有需要，我會安排他們聯絡 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | — |



Appendix C Questionnaire for the First Survey

您好！非常感謝你撥冗填答此次的問卷。本問卷目的在研究業務人員對顧客提供工作職責外的幫助行為，請根據您自身的經驗回答。本問卷僅供學術研究，不會透露您的個人隱私。您所提供的資料對本研究有極大的助益，在此由衷感謝您的合作與支持！

敬祝

萬事如意

國立交通大學管理科學研究所

指導教授：張家齊 博士

研究生：張雅君 敬上

下列各敘述是業務人員與顧客互動過程中有可能發生的行為，請依您與顧客互動的經驗填答，“非常同意”表示該敘述行為出現的頻率最高，“同意”是次高，以此類推

	非常不同意	不同意	有點不同意	沒意見	有點同意	同意	非常同意
1. 我會提醒顧客屬於他們的重要節日	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. 當顧客家裡有喜事，我會送禮祝賀	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. 雖然沒有被要求，我仍會在百忙之中盡快解決顧客的問題	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. 我會提供顧客跟我本業無關的專業資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. 我會透過人際關係提供顧客業務外的協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. 我會打電話關心客戶，聊些業務以外的事	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. 即使不是我經手的業務，我仍會給予協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. 我會辦活動以增進和顧客間的關係	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. 當顧客面臨感情問題時，我會專心傾聽	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. 如果我的顧客想買其他同業的產品或服務，我仍會協助他分析與選擇	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. 若顧客彼此有需要，我會安排他們聯絡	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. 我把顧客當作是對手	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. 當顧客的家庭遇到緊急問題，而他無法及時出現，當我會代他處理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. 當我獲知顧客生病住院，我會帶東西前往探望	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. 當顧客面臨感情問題時，我會幫他做分析	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. 當顧客碰到我研究過或擅長的問題時，雖然與我的職務無關，我仍會協助他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. 如果顧客需要，我樂於扮演他和家人間的溝通橋樑	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. 就算沒有好處，我仍會根據顧客的需求，調整原先的產品或服務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	非常 不同 同意	不 同 意	有 點 不 同 意	沒 意 見	有 點 同 意	同 意	非 常 同 意
19. 若有需要，我願意幫忙處理顧客的業務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20. 當顧客面臨事業瓶頸時，我會給予精神上的協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21. 除了談業務之外，平時我會和顧客出外用餐以聯絡感情	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. 當客戶處於低潮，我會主動給予關心	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. 我會跟顧客分享日常資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. 當顧客請我去做知識分享，即使跟我的職務無關，我仍會答應他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. 我會參加顧客邀請我出席的社交場合	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. 當顧客或其家屬生病，除了探望之外，我還會提供其他協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27. 我會記住跟顧客有關的節日，並以他的名義為他做點事	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. 我會探訪顧客以表示我的關心	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. 當我到外地時，我會買顧客喜歡的特產送他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. 在特殊節日我會特別選購顧客可能需要的禮物	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31. 我會分類顧客的需求以提供相關的資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. 為了取悅顧客，我會假裝同意他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33. 我是基於我能說服顧客買什麼來決定提供哪些產品， 而不是站在長遠滿足他們的基礎上	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34. 我有時候會美化產品，使他們聽起來盡可能的好	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. 一個好業務員必須將顧客的利益放在心上	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. 我試著幫助顧客達成他們的目標	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37. 我試著藉由滿足客戶以達成我的目標	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38. 我試著讓客戶跟我討論他們的需求	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39. 我留心顧客個性上的弱點，如此一來我可以用來施壓使他們購買	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40. 我試著結合有著問題的顧客及產品一起以幫助他解決這個問題	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41. 我從我的產品中提供最適合於顧客問題的產品給他們	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42. 我花在說服顧客買的時間比試著發現他們需求的時間還要多	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
43. 如果我不確定一個產品是否適合顧客，我還是會施壓讓他買下	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
44. 我試著賣客戶所有我能說服他買的東西，即使我覺得那已超出一個聰明的顧客會買的	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
45. 我盡可能地正確回答顧客有關產品的問題	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
46. 我試著藉由資訊去影響一位客戶而非藉由壓力	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
47. 我試著盡可能地多賣一點而非去滿足顧客	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
48. 我讓顧客對於產品可以做什麼有正確的期望	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
49. 我試著去找出什麼種類的產品對一個顧客而言最有幫助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
50. 我會暗示顧客某件事是超出我的控制範圍的，即使它不是	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51. 為了幫助顧客做較好的決定，我願意和他意見不一致	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
52. 我在探測顧客需求前就開始向他推銷產品	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
53. 對顧客描述產品時，稍微超過其真實性是必要的	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
54. 我試著了解顧客的需求是什麼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

下面敘述行為，請依個人經驗填寫，“是”請寫“O”，“否”請寫“X”

1. 有沒有在某些時機場合你曾經佔過某人便宜？
2. 你曾經有不公平地佔另外一個人便宜嗎？
3. 當你犯錯時你總是願意承認嗎？
4. 你會很快地承認犯錯嗎？
5. 你會不會有時候寧願選擇報復也不願意原諒和忘記？
6. 有時候當你沒能隨心所欲時，你會不會感到憤恨？
7. 即使面對那些難以相處的人，你總是有禮貌的嗎？
8. 不管你說話的對象是誰，你總是一位好的聽眾嗎？

個人資料填寫：

- 性別 男 女
- 年齡 25歲以下 26~30歲 31~35歲 36~40歲 41~45歲
46~50歲 51~55歲 56~60歲 61歲以上
- 教育 國小 國中 高中/職 五專/大學 研究所以上
- 職場經驗
5年以下 6~10年 11~15年 16~20年
21~25年 26~30年 31年以上(約____年)
- 在此產業的工作經驗
5年以下 6~10年 11~15年 16~20年
21~25年 26~30年 31年以上(約____年)
- 目前就職的公司名稱：_____
- 在此公司的工作經驗
1年以下 1~3年 4~6年 7~9年
10~12年 13~15年 16~20年 21年以上(約____年)
- 個人平均每月底薪
20,000以下 20,001~30,000 30,001~40,000 40,001~50,000
50,001~60,000 60,001~70,000 70,001~80,000 80,001~90,000
90,001~100,000 10萬以上(約____萬)
- 個人平均年收入
50萬以下 51~100萬 101~200萬 201~300萬
301~400萬 401~500萬 501~600萬 601~700萬
701~800萬 801~900萬 901~1000萬 1001萬以上(約____萬)
- 個人平均年業績
70萬以下 71~100萬 101~200萬 201~300萬
301~400萬 401~500萬 501~600萬 601~700萬
701~800萬 801~900萬 901~1000萬 1001萬以上(約____萬)
- 貴保險公司年營業額
1億以下 1~10億 10~20億 21~30億
31~40億 41~50億 51~60億 61~70億
71~80億 81~90億 91~100億 101億以上(約____億)

Appendix D Questionnaire for the Second Survey

您好！非常感謝你撥冗填答此次的問卷。本問卷目的在研究業務人員對顧客提供工作職責外的幫助行為，請根據您自身的經驗回答。本問卷僅供學術研究，不會透露您的個人隱私。您所提供的資料對本研究有極大的助益，在此由衷感謝您的合作與支持！

敬祝

萬事如意

國立交通大學管理科學研究所
指導教授：張家齊 博士
研究生：張雅君 敬上

下列各敘述是業務人員與顧客互動過程中有可能發生的行為，請依您與顧客互動的經驗填答，“非常同意”表示該敘述行為出現的頻率最高，“同意”是次高，以此類推

	非 常 不 同 意	有 點 不 同 意	沒 意 見	有 點 同 意	同 意	非 常 同 意
01. 我會提醒顧客屬於他們的重要節日	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
02. 我會提供顧客跟我本業無關的專業資訊	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
03. 我會透過人際關係提供顧客業務外的協助	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
04. 我會辦活動以增進和顧客間的關係	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
05. 如果我的顧客想買其他同業的產品或服務， 我仍會協助他分析與選擇	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
06. 若顧客彼此有需要，我會安排他們聯絡	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
07. 當顧客的家庭遇到緊急問題，而他無法及時出現，當我會代他處理	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
08. 當我獲知顧客生病住院，我會帶東西前往探望	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
09. 當顧客面臨感情問題時，我會幫他做分析	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. 當顧客碰到我研究過或擅長的問題時，雖然與我的職務無關， 我仍會協助他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. 如果顧客需要，我樂於扮演他和家人間的溝通橋樑	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. 就算沒有好處，我仍會根據顧客的需求，調整原先的產品或服務	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. 當顧客請我去做知識分享，即使跟我的職務無關，我仍會答應他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. 我會參加顧客邀請我出席的社交場合	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. 我會記住跟顧客有關的節日，並以他的名義為他做點事	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. 我會探訪顧客以表示我的關心	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17. 當我到外地時，我會買顧客喜歡的特產送他	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. 在特殊節日我會特別選購顧客可能需要的禮物	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

個人資料填寫：

- 性別 男 女
年齡 20 歲以下 21~25 歲 26~30 歲 31~35 歲 36~40 歲
41~45 歲 46~50 歲 51~55 歲 56~60 歲 61 歲以上

- 教育 國小 國中 高中/職 五專/大學 研究所以上
職場經驗

- 1 年以下 1~3 年 4~6 年 7~10 年 11~15 年
 16~20 年 21~25 年 26~30 年 31~40 年 41 年以上

- 在保險業的工作經驗
 1 年以下 1~3 年 4~6 年 7~10 年 11~15 年
 16~20 年 21~25 年 26~30 年 31 年以上(約_____年)

目前就職的公司名稱：_____

- 在此公司的工作經驗
 1 年以下 1~3 年 4~6 年 7~10 年 11~15 年
 16~20 年 21~25 年 26~30 年 31 年以上(約_____年)

- 個人平均每月底薪
 20,000 以下 20,001~30,000 30,001~40,000 40,001~50,000
 50,001~60,000 60,001~70,000 70,001~80,000 80,001~90,000
 90,001~100,000 10 萬以上(約_____萬)

- 個人平均年收入
 30 萬以下 31~50 萬 51~100 萬 101~200 萬 201~300 萬
 301~400 萬 401~500 萬 501~600 萬 601~700 萬 701~800 萬
 801~900 萬 901~1000 萬 1001~2000 萬 2001 萬以上(約_____萬)

- 個人平均年業績
 30 萬以下 31~50 萬 51~70 萬 71~100 萬 101~200 萬
 201~300 萬 301~400 萬 401~500 萬 501~600 萬 601~700 萬
 701~800 萬 801~900 萬 901~1000 萬 1001~2000 萬 2001~3000 萬
 3001 萬以上(約_____萬)