

Training and Developing the Sales Force

How Important Is Sales Training?

- More knowledgeable
- Understand markets
- Better understand customers and deliver better service
- Achieve higher sales and incomes
 - Greater job satisfaction because they're successful

Sales Force Training

- Sales training—the effort an employer puts forth to provide salespeople job-related culture, skills, knowledge and attitudes that should result in improved performance.
- Sales culture—the set of key values, ideas, beliefs, attitudes, customs and other capabilities & habits shared or acquired as a sales group member. It defines what is important in an organization and is the combination of attitudes and behaviors to which most members of an organization subscribe.
 - As product life cycles become shorter and relationships with customers have become more complex, training for sales forces has become increasingly important

Sales Force Training-Issues

1. Many companies design training programs without thoroughly assessing the training needs
2. Customer needs/evaluations of salespeople are often ignored in program design
3. Management does not reinforce the training

The Training Process: 4-Stage Training Cycle

Assess the Training Effort

- Determine the training's value to the individual salesperson
- Determine the training's value to the organization

Identify the Firm's Training Needs

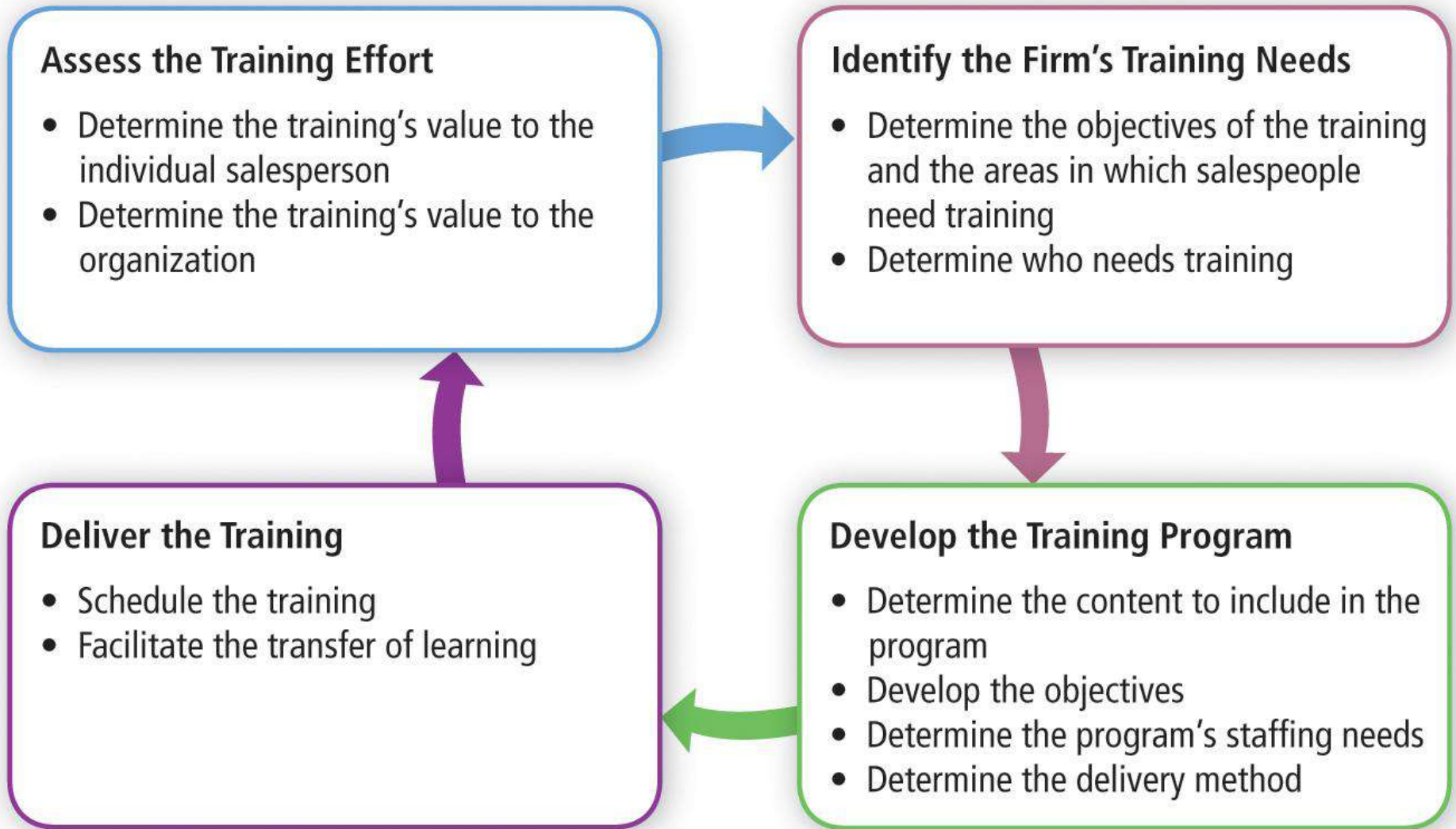
- Determine the objectives of the training and the areas in which salespeople need training
- Determine who needs training

Deliver the Training

- Schedule the training
- Facilitate the transfer of learning

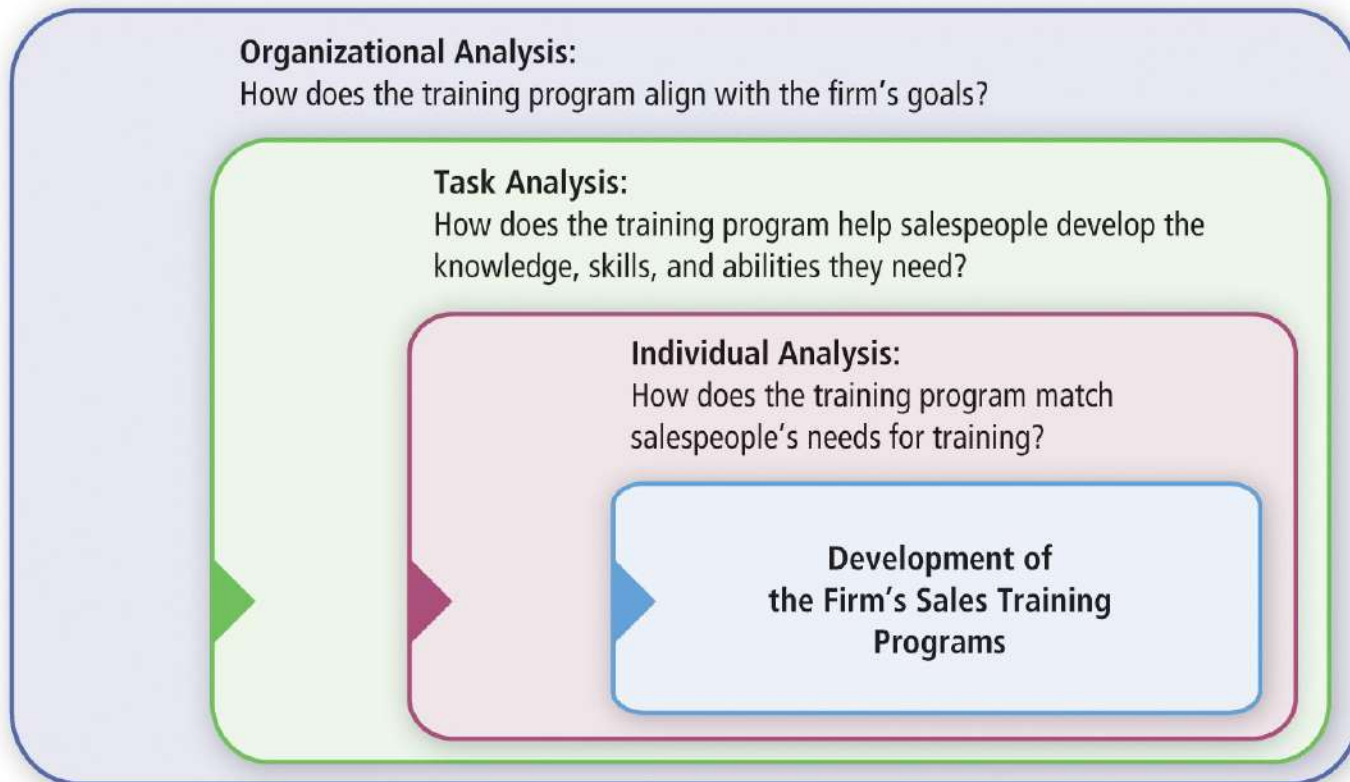
Develop the Training Program

- Determine the content to include in the program
- Develop the objectives
- Determine the program's staffing needs
- Determine the delivery method



Determine Objectives

Assessment of Training Needs at Different Levels



Identifying Knowledge, Skills, and Abilities (KSAs)

Sources of Training Needs Information



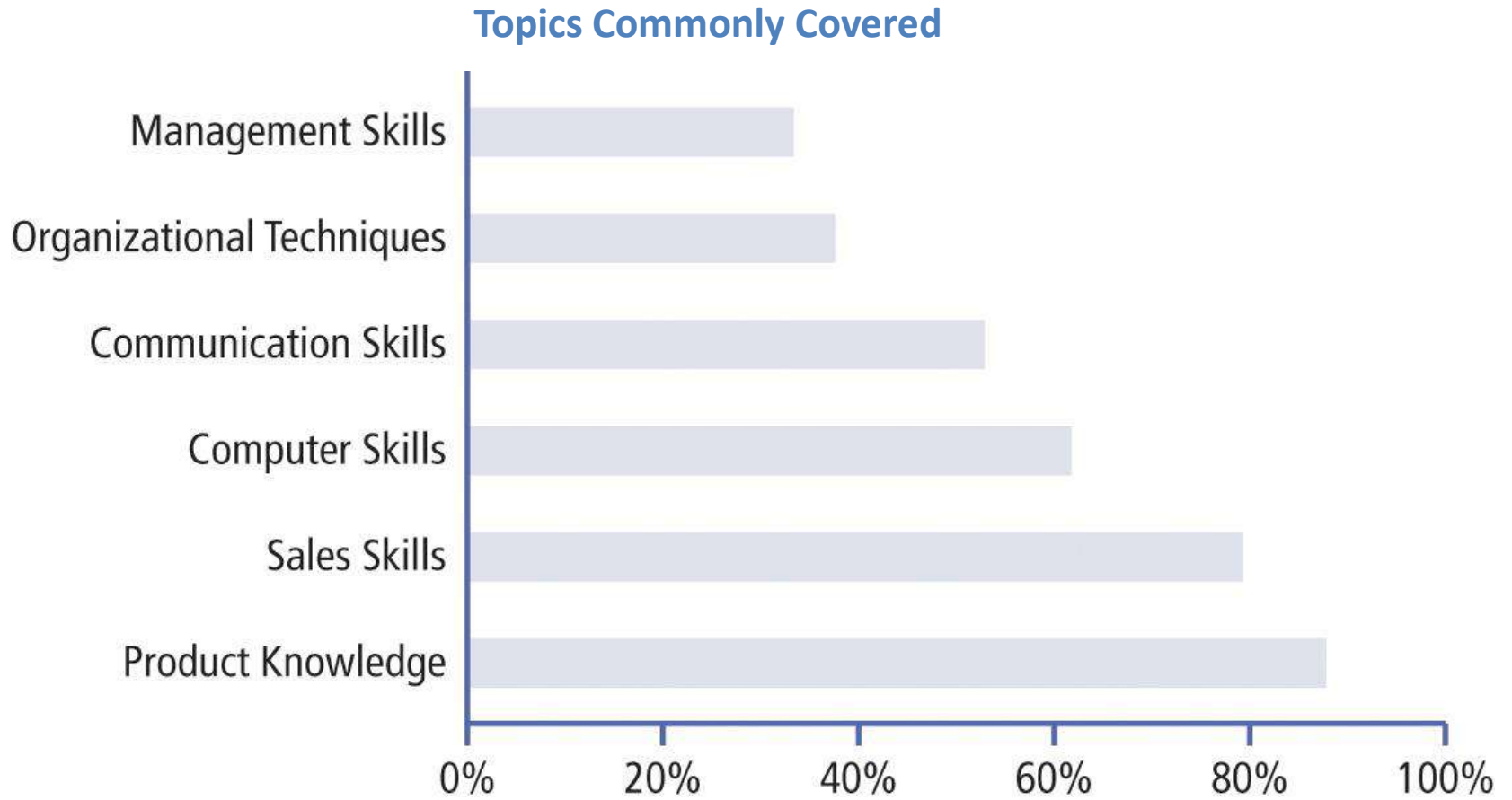
Determine Who Needs Training

- Training needs may vary depending upon rep's experience level and the needs of the markets
- Training needs may be identified from:
 - Quantifiable performance appraisal data
 - Customer satisfaction or CRM data
 - Training needs surveys taken by sales managers and reps
- After identifying needs, create training and development plan for reps
 - Plan should include courses rep should take at career milestones, training from outside vendors, job rotations exposure, etc.

Common Sales Training Topics

1. Product/service knowledge
2. Market/Industry orientation
3. Company orientation
4. Selling skills
5. Time and territory management
6. Legal and ethical issues
7. Technology
8. Specialized topics

What Content Is Needed?



The Training Process:

4-Stage Training Cycle-(2.) Develop the Program

Develop the Training Program

- Determine the content to include in the program
- Develop the objectives
- Determine the program's staffing needs
- Determine the delivery method

Content Will Vary Based on Target Group

- Programs for **new hires**
 - Company orientation
 - Product and market information
 - Selling processes
 - Technology skills
- Programs for **more experienced reps**
 - Advanced sales skills
 - Communication and presentation skills
 - Technology skills

On-the-Job Training

- Exposes new reps to practices, products, and customers immediately
 - New hire will learn to model the behavior of the more experienced rep
- Refresher courses for more experienced reps cover advanced sales skills
 - How to work with larger or more complicated customers or advanced products and services

Integrating Technology

- Keys to successful sales technology training include
 - Ensuring that reps see benefits of technology so they will accept and use it
 - Thoroughly training reps to use technology both in the field and out
 - Providing adequate tech support and follow-up training

Professional Development Activities

- Professional speaking/role-playing
- Account management
- Team selling
- Negotiating contracts
- Category management
- Other advanced training conducted as part of an industry-wide seminar
- Summer institutes or graduate courses offered by colleges, universities, and professional associations

Staffing the Training Program: Internal vs. External

- Generally, internal trainer will have more credibility
 - Exception: new technology, training offered by developer
- Dedicated sales training team within the firm?
- Large number of people needing immediate training?
- Outside technology partner to facilitate delivery?

Staffing the Training Program: Time

- How frequently is the training needed?
 - Recurring program offered at regular intervals, it may warrant in-house development
- Is the program needed on a regular basis or is it only needed once?
- Can it be rolled out gradually or is it needed immediately?
- How involved do sales managers need to be?

Staffing the Training Program: Costs

- How does outsourced training compare price-wise to internal training?
 - If internal, will there be extra costs for researching content or creating materials
 - Additional staffing costs required?
 - Travel to training site?

Role-Playing and Avatars

- Role-playing exercises
 - Requires rep to present information to a “client” (usually a sales trainer or another sales trainee)
 - Overcome sales challenges in real time
- Avatars: computer representations of humans
 - Provides consistent experience with a coach who does not tire
 - Available any time of the day or night
 - Can be used to train reps individually or in groups
 - Can be repeated until mastery is achieved

The Training Process:

4-Stage Training Cycle-(3.) Deliver Training

Deliver the Training

- Schedule the training
- Facilitate the transfer of learning

Scheduling the Training

- Location
 - Travel, lodging costs
 - Lost selling time
- Psychological “readiness” of the trainees
 - Timing of the training in the sales cycle
 - Time to complete pretraining assignments

Facilitate Learning Transfer

1 Training and field conditions similar

2 Provide opportunities to practice

3 Variety of situations to apply new material

4 Identify important features of the task

5 Opportunity to practice in the field

The Training Process:

4-Stage Training Cycle-(4.) Assess Training

Assess the Training Effort

- Determine the training's value to the individual salesperson
- Determine the training's value to the organization

Assessing the Results

Reaction

Learning

Behaviors

Results

Value to Individual

Reaction

- Trainee feedback, training staff comments, supervisory feedback
- Most frequently used method
- Don't show if anything was really learned and applied

Learning

- Measuring the amount of information participants mastered during the program
- Doesn't necessarily reflect if material can be applied productively back in the field

Value to Organization

Behaviors

- Identifies to what degree trainees applied training principles and techniques to their jobs (learning transfer)
- Research shows this level of evaluation has only a few shortcomings and is particularly useful

Results

- Whether or not an organization achieved objectives it sought by conducting training
- More sales, fewer complaints, higher svc rating?
- Difficult to tell if results are because of training or other factors
- Utility analysis: looking at economic impact the training had by examining cost-benefit trade-offs of training program

Completing the Sales Training Cycle

- Compare training results with initial objectives
- Objectives met, program is considered a success
 - Often program will go forward with only minor modifications and updates
- Objectives not met
 - Majority did not systematically set specific objectives for their training programs
 - Without objectives to guide development of training, properly implementing and evaluating will be difficult

Best Practices for Sales Trainers

Needs Assessment

- Is the training tied to the organization's mission and vision?
- Can you understand the true nature of the problem/issue at hand, and what is needed to correct the problem?
- Is training the appropriate solution, or can the problem be corrected by other solutions, such as changing the firm's procedures, developing job aids, or modifying jobs?
- Have you determined the learning objectives that will result in the desired changes?
- Have you identified the knowledge and skills that will produce the desired new behaviors?
- Can you determine the cost/budget constraints and develop suggested solutions within these constraints?
- Can you identify the learning styles and needs of participants and incorporate them into the program's design?

Best Practices for Sales Trainers

(continued)

Content Development

- Does the program incorporate adult learning principles into all aspects of the training?
- Does the content emphasize the essentials, not every possible detail?
- Does the program provide participants with the materials they need without overwhelming them?

Technological Proficiency

- Is the instructor up to date in the use of most current technology?
- Is the instructor able to utilize the technology that best fits the learning situation, rather than using technology for the sake of appearances?
- Can the instructor bring the course material “alive” via an effective presentation regardless of the technology used?

Best Practices for Sales Trainers

(continued)

Personal Professional Development

- Does the instructor have an interest in participants' personal growth and learning?

Evaluation

- Does the instructor seek feedback to improve the program?
- Does the program include an evaluation process to capture information on the training's effectiveness, learning retention by participants, and the use of learning related to the firm's day-to-day business practices?