Chapter 5: Training and Developing the Salesforce

INTRODUCING THE CHAPTER

This chapter helps students to understand how to develop training and development programs for the sales organization. Managers must first identify the firm's training needs by assessing the firm's strategies and key initiatives to make sure that they identify the training needs that match firm's organizational-level needs. They also need to determine how salespeople's knowledge, skills, and abilities might be shaped through new training and development initiatives. Strong managers also consider what training might be needed at an individual salesperson level.

Once the manager identifies the firm's training needs for a particular group of salespeople, the manager has a number of a steps to take develop the training program. For each group that needs to be trained, the manager must determine the objectives as well as the content of the training program. Given the objectives of the program, the manager needs to determine the most effective delivery method to use as well as who will be delivering the training and staffing the training program. After delivering the training, it is important to have an assessment process in place to ensure that the training delivered value to the individual trainees as well as met the organization's objective.

The training cycle can be considered complete once the results are compared with the program's initial objectives. However, most training programs are considered ongoing in nature and will be reviewed and modified as needed before another round is offered.

Chapter Objectives

After completing this chapter, students should be able to:

- Identify factors that help determine the types of training salespeople need.
- Summarize the inputs needed to design and deliver an effective sales training program.
- Explain why it's important to assess the effectiveness of a firm's sales training and how it is assessed.
- Recognize the elements that contribute to effective and ineffective training programs.

Chapter Outline

I. How Important Is Sales Training?

II. The Training Process

- A. Identifying a Firm's Sales Training Needs
    1. Determining Sales Training Objectives
    2. Determine Who Needs Sales Training
- B. Designing and Developing the Training Program
    1. What Content is Needed?
    2. Developing the Objectives of Sales Training: Changing Ideas into Action
    3. Selecting the Training Delivery Method

4. Staffing or Developing the Training Program
    a. Internal versus External Staffing Resources
    b. Time Pressures
    c. Costs
- C. Delivering the Training
  1. Scheduling the Training
  2. Facilitate the Transfer of Learning
- D. Assessing the Firm's Training Efforts
  1. Determine the Value of Sales Training to the Individual
     a. Reaction (Level 1)
     b. Learning (Level 2)
  2. Determine the Value of Sales Training to the Organization
     a. Behaviors (Level 3)
     b. Results (Level 4)
- E. Completing the Sales Training Cycle

III. Managing Your Career

IV. Summary

MANAGING YOUR CAREER

Asking students to think about their personal investments in their personal and professional development can be an interesting way to begin discussions of this chapter. What types of investments have they taken seriously? What opportunities for learning did they perhaps "miss out on" because they are not thinking about fully engaging? If your students are seniors who have had internship experiences, ask them to describe the training programs and tools to which they were exposed in their internship programs. Discuss how companies use a variety of different types of training (in the classroom, online, in the field, etc.) to help their sales professionals strengthen existing and develop new skills for future positions.

SUPPLEMENTAL VIDEOS DISCUSSION SUGGESTIONS

Think Fast, Talk Smart: Communication Techniques (Matt Abrahams): Matt talks about the fact that we are asked to speak spontaneously far more frequently than we have the opportunity to give a planned presentation. To begin, we have to get our anxiety under control. Use the topic of anxiety management as an opportunity to ask students, by show of hands, if they are fearful of speaking in front of others. Then ask about anxiety about speaking in the classroom. In which classrooms are they more comfortable speaking and why. Help them to understand that this module is very helpful to think about when considering the area of training and development.

How To Coach (by asking questions) (#CoachingLeaders): This module focuses on asking the right questions. Instead of asking Does that make sense? (99% of the time, this question yields "yes" because the respondent either doesn't want to hurt your feelings, or doesn't want to say something doesn't make sense to him or her). Instead, focus your questions, particularly in training sessions on *how would you apply this information to a scenario*. Use this video as a basis for a brainstorming session on ways to making coaching, classroom, or training situations more engaging. You might be surprised at that you take away for your own class.

How to Manage and Improve Sales Performance (Jason Jordan): Jason is a leading consultant in industry in the sales management area and the training that sales managers need. Use this podcast as an opportunity to have a discussion beyond the contents of this chapter (which focuses on training salespeople) to discuss the types of training programs that sales managers might need.

QUESTIONS AND PROBLEMS

1. **Haley Mareno mentioned the importance of developing a sales training program. What elements does she consider?**

   Gather feedback from the people being trained and develop. Managers must provide feedback by (1) regularly assessing development plans, (2) conducing surveys of training and development programming and materials, and (3) having day-to-day feedback mechanisms.

2. **When does implementing a sales training program not make sense?**

   Companies who see sales training as being too expensive or too time-consuming, but that's really short-sighted thinking. Smaller firms typically do not have the resources or specialized expertise to offer training needed by their sales representatives.

3. **Describe the four steps in the sales training cycle.**

   (1) Identify the firm's training needs (who needs training, what are the objectives of the training), (2) develop the training program (what will the training cover, who wills staff the training program, how will the training be delivered), (3) deliver the training (how will the training be facilitated, when will the training be held), and (4) assess the training effort (is the training valuable to the individual salesperson, is the training valuable for the organization).

4. **Why is it important to assess training needs at the organizational, task, and individual level?**

   First, at the organizational level, managers need to understand how the training program is aligned with the firm's goals. Second, at the task level, managers need to understand how the training program must be designed to develop the knowledge, skills, and abilities that salespeople need. Third, at the individual level, managers need to understand how the training program matches the salesperson's need for training.

5. **Sales managers at small and larger organizations are likely to experience different tasks when conducting sales training programs. Explain what those differences could be.**

   In larger organizations, training and development personnel and sales managers may not be as cued into the strategy changes that a large firm is making that has important implications for the sales function.

6. **Explain the concept of customer journey mapping. How is it done?**

   Customer journey mapping is the process of creating a visual representation of a customer's decision process as it relates to a specific product category. The goal of the mapping process is to understand the customer's perspective.

7. **Besides language issues, what are some of the challenges of training a global salesforce?**

   Managers need to determine if they are going to offer the training in a centralized location and require people from various countries to travel for the training to a different part of the globe. Or, alternatively, they can offer the training in different countries using a decentralized model. Beyond language, it is important to determine how best to localize materials to take into consideration differences in culture, sales processes, and market operations. Follow up and coaching after the training also must be considered.

8. **What are typical content areas for new hires? What content is more useful for an experienced salesforce?**

   For new hires, the content typically includes an orientation to the company, steps and behaviors used in the selling process, product and market information, procedures to monitor the progress of a sales, using sales-related technology and software, networking, internal sales process, social selling, and on-the-job training. Refresher courses for experiences salespeople include advanced sales skills, working with larger cases and/or customers, and advanced product or service training.

9. **Other than in-person sales training, what are some other options? Compare in-person training to virtual training. What are the advantages and disadvantages of each?**

In-person Instructor-led training	+ Flexible, interactive, networking, collaborative, engaging, skill development, feedback – Can be expensive (travel, housing, meals, missed selling time)
Virtual Instructor-led training Webcasts/webinars Web meetings E-learning Simulations Gamified training On-demand training Podcasts	+ Limits expenses due to travel, housing, meals and missed selling time + Can be highly engaging and effective + Can be self-paced and flexible

10. **Why is assessing a training program important? What methods are available to assess a sales training program? Why might some organizations be hesitant to assess their sales training programs?**

    The training cycle is not complete until its results are compared with the program's initial objectives. Training programs can be assessed via within-person analysis (pre-test and post-test knowledge and skills), between-person analysis (compare results across persons to see which group benefited the most), and at a macro level of analysis (assessing the training's effectiveness across the entire salesforce and document the benefits for the entire firm). Specific assessments that are available to assess training programs include feedback from participants/trainees, supervisors' feedback on trainees' behaviors after the training, self-assessments or appraisals, customer feedback, performance tests, course evaluations, subordinates' appraisals, pre- and post-training measurements, and knowledge tests. If firms did not set specific objectives for a training program, they may be hesitant to assess the program (as they are unable to properly evaluate the program).

ROLE PLAY

Developing a Sales Training Plan

Split the students into three equal groups. Take five minutes to coach each group and give the groups about ten minutes to prepare for the role play.

For the first group, coach these students to play the role of the retiring district manager. Ask this team of students to collectively develop short (2-sentence) profiles and names for each of the 14 sales representatives. How well is each person doing relative to their quota? What are their weaknesses and strengths?

For the second group, coach these students to play the role of the new district manager. Ask them to consider that the corporate announcement of your promotion will be received differently by different people in the organization. What do you need to learn from the retiring manager of the district about the individual players on the team? What do you need to learn from the vice president of sales about the current training programs and budgetary allowances for training?

For the third group, coach these students to play the role of the vice president of sales. In their role, they can share that the company is really looking to examine their onboarding and initial sales and product training programs as they are unsure of whether the current programs are hitting the mark. Their goal should be to enlist this enthusiastic new manager to take on work (unpaid) that the training team has not been doing.

In the debrief, explain to the students that when you are new in a role, you can enthusiastically take on more responsibilities as others in the organization "allow" your enthusiasm to work against you. It's important in these early conversations, when you are new, to ask more questions and gather more information than to commit to specific outcomes. Your first 90-days in a new leadership position need to be filled with fact-finding exchanges *before* you commit to specific strategies or programs.

ANSWERS FOR CHAPTER CASELETS

Caselet 5.1: Remaining a Top Sales Training Organization

Case Questions:

1. **What challenges did the new product and brand mix mean for Shaw's traditional sales training program?**

   Shaw is adapting to a new and changing marketplace from one that was relatively stable in the past. Hopefully, marketing research and the CRM systems will provide continuing customer insights. With new products we can assume the salesforce will require new training and such training will require additional funding for training development and delivery to trainees. In addition, all members of the salesforce will need to be skilled at adapting to new systems of tracking of customer behaviors and resulting sales.

2. **How can a trainee be expected to become a functional subject matter expert across so many product categories?**

   This will be a challenge, especially given that the salesforce is inheriting new and existing sales teams. Some teams will likely have members with specialized product understanding and skills who can assist other less skilled members when the need arises. Training materials will need to be interactive and available on demand so that sales personnel can easily access information that they may need. Additionally, reward programs may need to be adjusted.

3. **Shaw's territory managers are now calling on the same accounts to sell different brands and products. How can Shaw better prepare trainees to become part of that team?**

   Trainees need to be comfortable working with the marketing enablement tools to be knowledgeable about customer needs and past communications. It may be that they will be working as a team member with other territory managers and require training as to the best teamwork practices.

4. **What are the potential pros and cons of Shaw's new training and territory placement strategy?**

   The key advantage of the new training and placement strategy is that the salesforce should be positioned to be responsive to a changing customer base and marketplace. The downside of this change would include an increased understanding of the products and brands, and teamwork and communication skills. Failure to address these issues will likely result in a less skilled salesforce which can result in lost sales, increased levels of frustration, and ultimately higher levels of turnover and associated costs.

5. **What enhancements should Shaw consider making to its sales training program? What business partners need to be involved in the process?**

   Assuming the amount of time devoted to training is not increased, the new system needs to be interactive and available on demand. New delivery formats should allow for increased flexibility for trainees. Trainers, who are frequently drawn from the salesforce, will also require training on new systems. New delivery technologies and new vendors need to be monitored to be ensure efficiency of all parties.

6. **How can Shaw maintain trainee attention and enthusiasm without lengthening the training curriculum?**

   Bloom's taxonomy provides insight on some foundational skills for the training curriculum. The higher levels of behaviors require higher levels of interactivity between trainees, trainers and technologies and are likely to help keep the salesforce focused. Additionally, measures of effectiveness will need to be monitored and rewarded accordingly.

Caselet 5.2: What Is Sales Training Really Worth?

Case Questions:

1. **How can companies ensure training is effective when people learn in different ways and at different speeds?**

   First, a mix of training delivery methods (e.g., virtual, remote and face-to-face) could be beneficial when accommodating different learning styles. Second, some organizations offer internship programs, which allows the organization to vet candidates over a few months without having to extend a fulltime offer. During the internship, the organization could better understand the learning style of the candidate and make any necessary adjustments prior to extending a fulltime offer. Third, training evaluation procedures could be useful to ensure each salesperson is learning the training material whether in an internship or fulltime training program.

2. **Jenna had more previous knowledge of the sales process relative to Grant. Should companies focus on hiring people who have foundational knowledge from sales classes like Jenna does? Or should they also continue to hire people like Grant, who have other types of related sales experience?**

   This is a paradox that many companies face. Some companies find it beneficial to hire exclusively from institutes of higher education that have sales programs because of the reduced turnover and faster ramp-up time. However, depending upon the level of customization, the length of training, and the degree to which the environment is team-based, college students like Grant could be set up for success.

3. **Traditionally, managers are more easily able to engage in regular face-to-face coaching and developmental conversations with their inside salespeople. How can managers offer the same level of development when they rarely see their salespeople in the field face-to-face?**

   Some argue that virtual interactions cannot replace face-to-face interactions. However, many companies are increasing their virtual inside salesforce due to the cost savings for the company and the potential increase in productivity/quality of life due to reduced travel time. For companies that rely solely on virtual development, it is recommended that sales managers schedule weekly meetings with each individual salesperson. In addition, it is recommended that sales managers are available to salespeople via networking tools such as Microsoft Teams, Slack, or text message.

4. **How can companies ensure the effectiveness of their sales training for multiple generations by utilizing a variety of training delivery methods (e.g., remote learning and classroom learning)?**

   In many cases, the answer depends on the training class size and length. In a best-case scenario, the company adapts training to each salesperson's learning style. However, for larger companies that have multiple training classes per year consisting of 20+ salespeople, it might not be cost-effective to fully customize training for everyone. Therefore, organization could utilize a multi-method approach (e.g., mix of remote and face-to-face training). Mentors could also be useful to supplement classroom training. Mentors typically spend time with each individual salesperson and fill in any gaps that the salesperson missed in training.

OTHER IN-CLASS EXERCISES

Creating an Initial Sales Training Program for College Hires

Ask students to assume that they have been hired as new sales representatives for a company that sells lighting fixtures and supplies to architectural and interior design firms. Place students in groups of 4-5 and ask them to identify the step-by-step process that they would need to take to develop that initial training program.

Leveraging Existing Training Resources

Divide the class into three groups (if the class involves 45 or fewer students; if teaching a larger class, ensure that the groups are not larger than 15 people). Assign one group to focus on training needs for new hires with no or limited sales experience. Assign a second group to focus on the training needs for experienced sales professionals having five or more years of experience. Assign the third group to focus on first-line sales managers having less than 5 years experience as a manager. For each of the three groups, ask them to search the training programs offered by LinkedIn Learning to identify their top ten choices for their target audience.