How Ineffective Sales Training Impacts Your Business

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Lost Sales Opportunity

According to the Association for Talent Development Research sales organizations spend an average of $954,070 per year and $1,459 per salesperson on sales training (2016). Yet 50% of learning content is not retained within five weeks; 84% of all sales training content is lost after 90 days (Sales Performance International). In a 2014 Brainshark survey of 162 sales training professionals, 48% say their organization's sales training content isn't engaging enough to work, while 25% say the materials created does not match the sales teams' needs. It's no wonder that only 32% describe their organization's current sales training programs as "effective."

Annual Sales Training Investment

- **$954,070 /Company**
- **$1,459 /Salesperson**

Post-Training Retention

- **50% Lost After 5 Weeks**
- **84% Lost After 90 Days**

Can you confidently say that a sales rep, upon completion of your new hire sales training program, has high-level confidence in your solutions and will effectively reply to common objections and questions from customers and prospects? Can you be sure they have comprehensive knowledge of the competitive landscape and the basic insight statements and value propositions needed to differentiate your products and solutions? Will they act as a consultative-level representative to your potential and existing customers? If the training you offer does not achieve these objectives I can guarantee your company is losing sales opportunities to the competition and that is negatively impacting sales goals.

Now ask yourself the same questions about the training you provide for existing reps. If their product knowledge and selling skills training is equally ineffective there is significant lost sales opportunity and business impact as well. Whether your company has an outside sales force, inside sales force, or a hybrid of both, this leads to frustration for leadership and sales management. What makes training work and bring value? How can it be created and delivered in the most impactful and meaningful way?

Is Your Sales Training Passive?

How many times have you sat through "training" that was slide after slide of somebody's PowerPoint presentation? I call this death by PowerPoint. The presenter stands in front of people, lights are dimmed and those on the receiving end struggle to stay focused and awake. For sales people, sales managers, and anyone in business this is pure torture. And it is not training. It is merely a passive transfer of information.

Did I just describe the sales training at your company? You are not alone. In fact most training programs are still passively delivered. As a sales leader, how frustrated are you when the sales meeting ends and there are little to no desired behavior changes post-training? New hire training programs, onboarding courses, new product launches, and national sales meetings conducted in a passive manner have minimal impact on learning and desired behavior change. Only through active learning strategies and an instructional design process can you transform your inside/outside sales training to maximize the learning and critical behavior changes that drive sales.

Active Learning

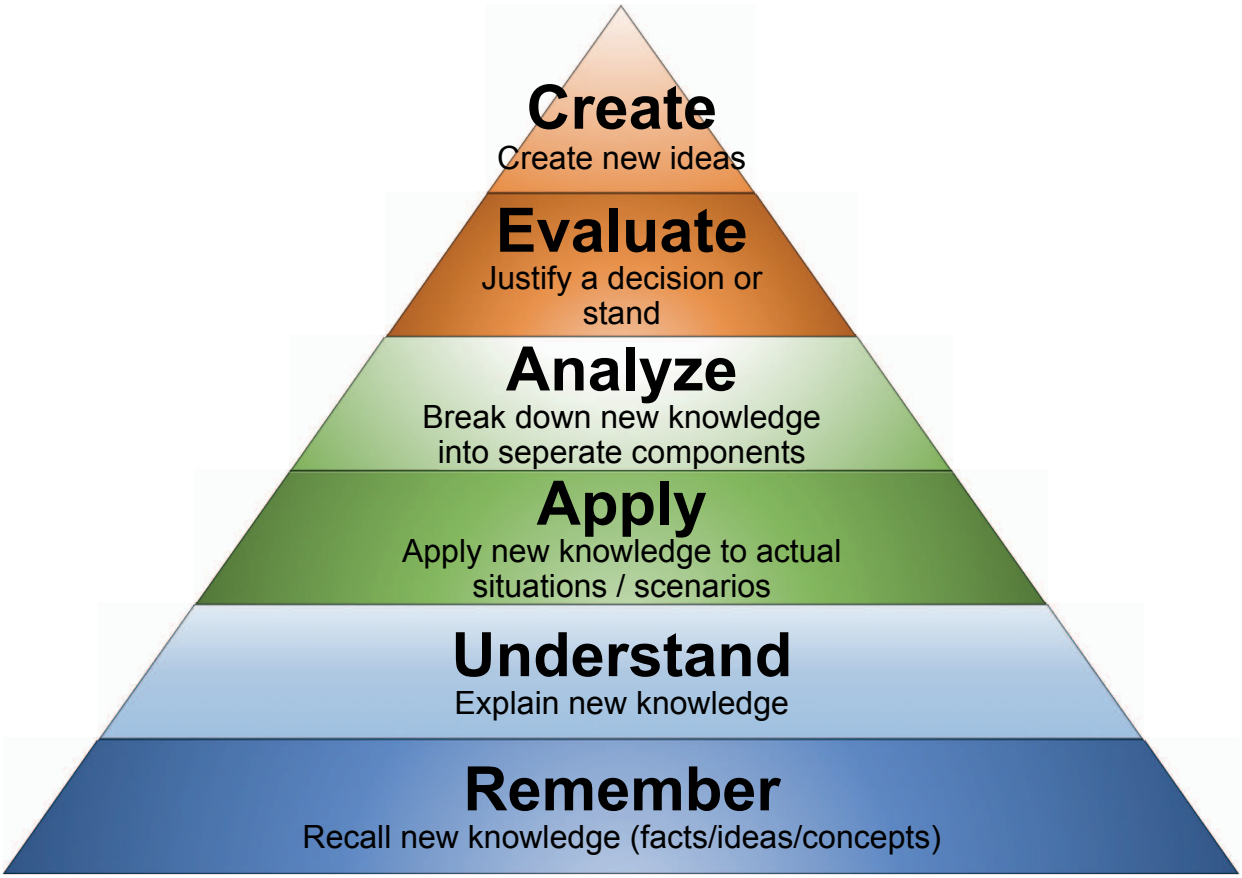
The primary goal of sales training is to increase the sales representative's confidence in the product or service and then to effectively sell it. You need to identify the desired behavior changes and give them the tools to implement these behaviors in the shortest amount of time to impact sales. To accomplish that you will need to change your training from passive learning to active learning.

In active learning situations students are actively engaged in the learning process. Adults learn more effectively when they can apply their new knowledge and skills in real-life problem-solving scenarios. Hands-on, role-play, case study problem-solving scenarios, and even games will engage your sales reps to learn *how* to effectively sell. It's not what is taught, it's *how* it is taught. Let's examine how adults learn and how active learning and an instructional designer can transform your training to impact learning and, in turn, your sales.

Triangle Role Play:
Sales Rep / Customer / Observer

Bloom's Taxonomy of Adult Learning

How do adults learn? Educational psychologist Dr. Benjamin Bloom identified and labeled the "steps" of adult cognitive learning from simple to complex. These steps are called Bloom's Taxonomy, and each step has specific **Learning Objectives** that must be mastered before the learner can move to the next level of learning. For example, the learner must memorize new knowledge in the **Remember** step, then practice describing the new knowledge in the **Understand** step, then **Apply** the new knowledge in real-life scenarios such as presentations or role play. The first three levels: **Remember, Understand**, and **Apply** are attainable in an introductory sales training workshop. **Analyze Evaluate**, and **Create** are the higher levels of cognitive learning and can be achieved over time.



Action verbs used to create Learning Objectives

Remember	Understand	Apply	Analyze	Evaluate	Create
Identify	Describe	Apply	Analyze	Evaluate	Create
Define	Explain	Demonstrate	Compare	Judge	Design
List	Discuss	Implement	Contrast	Argue	Develop
Repeat	Locate	Execute	Differentiate	Defend	Modify
State	Paraphrase	Solve	Separate	Support	Assemble
Recall	Articulate	Develop	Examine	Conclude	Compose
Reproduce	Restate	Interpret	Classify	Criticize	Produce

The Instructional Designer

When I hung up my sales bag after 20 years of outside sales to become a sales training manager for a medical device company I thought I was perfectly prepared to take on the re-creation of their new hire training program. I had already delivered over 100 education evening events to dentists on dental implants. I created almost all of the training and hands-on materials. I knew it was all about the hands-on! I was a great teacher, a subject matter expert, content developer, and I had a lot of enthusiasm and motivation. I had all the tools I needed to be the best trainer ever and create the best sales training program ever…but I didn't. The missing component for effective training was instructional design.

An instructional designer takes your passive /lecture product training and turns it into active learning. Active learning begins when, like on a sports team the trainer becomes a coach, and the trainees become the players. The coach provides some instruction, but then the players practice! And they practice a lot. The coach focuses on coaching. Coaches give feedback to improve performance and facilitate discussions where the trainees learn through self-discovery. This is classic adult learning theory in action. An instructional designer knows how to collaborate with the subject matter experts in your company and design this learner active training with customized metrics to measure the specific learning, behavior changes, and impact you're looking for.

What is Instructional Design?

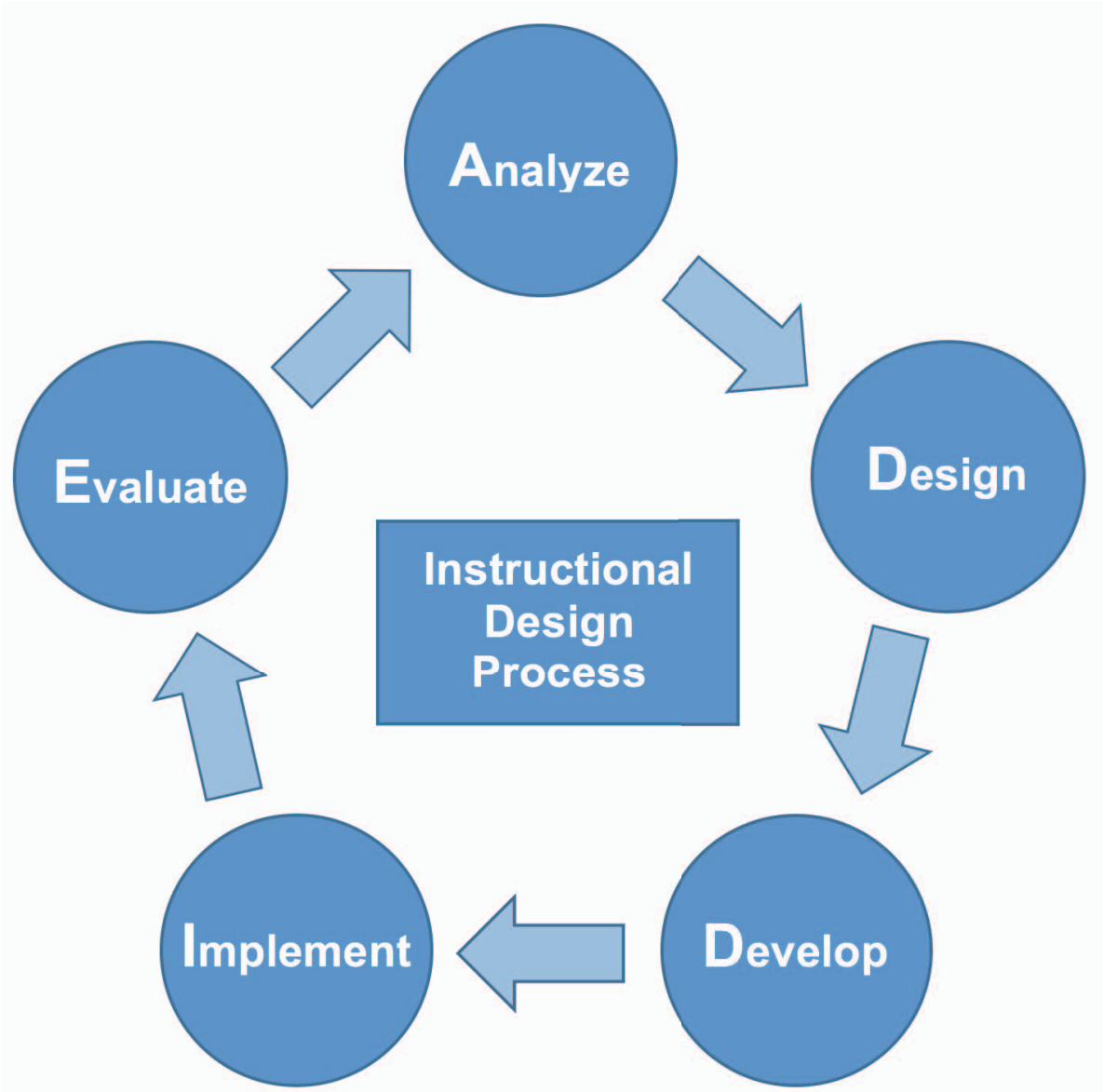
"Instructional Design is defined as a systematic process that is employed to develop education and training programs in a consistent and reliable fashion."
~Reiser and Dempsey, 2007

There are specific steps in the instructional design process when creating, executing, and measuring the effectiveness of sales training. The complete instructional design process is called ADDIE.

ADDIE

The ADDIE model is a process used by instructional designers to create and measure effective learning. There is no more “winging it”. ADDIE is a simple process you can apply in your organization to improve sales training right away.

ADDIE stands for the **A**nalyze, **D**esign, **D**evelop, **I**mplement, **E**valuate:



- **Establish Your Training Project Team**
- **Project Plan**
- **Needs Assessment**
- **Determine Knowledge, Skills and Attitude Gaps**

Training Project Team

The first step is to establish the training project team. This can consist of 1-2 sales managers, 4-6 high-performing sales reps, product managers, and possibly an HR representative and the head of sales. The sales trainer acts as the lead project manager. These team members are your subject matter experts (SMEs) and will validate the relevancy of the training as you go through the ADDIE process.

Project Plan

Create a project plan with specific role and responsibilities of the project team members, deliverables, timelines, milestones, communications and budget. Have everyone agree and commit to the project plan before moving forward with anything. Having upfront buy-in from the key stakeholders such as head of sales and company leadership is imperative. Project plan templates can vary depending on the scope of the training project from relatively simple: 15 sales reps/ 2-day workshop, to complex: 150 reps /National Sales Meeting. A key element for success is this dynamic document that helps you manage the project.

Here is an example of a simple project plan template.

Date Due	Date Done	Action Item	Owner	Comments

Set up regular meetings with the project team (bi-weekly / weekly) to communicate the progress of the project and ensure that everyone is staying on task. Try to keep the meetings brief, focused and concise.

Needs Assessment

A lot of sales leaders and managers assume that they know the knowledge and skills gaps of their sales reps, however, this is not always the case. The best way to determine the learning gaps is to ask the sales reps directly. This is called a needs assessment.

Four data gathering tools of a needs assessment:

Questionnaire

Focus Group

Observation

Interview

Keep this simple! Get sales reps on the phone, or sit down and ask them open-ended questions about their knowledge, skills and attitude gaps. Ask sales management the same questions to validate and enhance your data. Remember, you are facilitating, so ask questions, actively listen, and probe more.

"What is going well?"
"What are the challenges?"
"What tools do you need to succeed and close sales?"

Create a brief survey with some open-ended questions to send to the entire sales force. Co-travel with a few outside reps or shadow the inside reps and observe them making the sales calls. Facilitate a focus group with the same team and draw out more information. The training can then be designed and developed to directly address what you learn from the needs assessment.

It is imperative to collaborate with sales leadership and other key stakeholders before and during the needs assessment as they will provide unique insights that will enhance and strengthen the needs assessment data.

Once you have collected all your data take time to analyze the common responses, identify the specific learning needs, and define them. Present the findings to the project team for validation.

- **Identify Learning Objectives**
- **Learning Activities**
- **Assessments**
- **Training Delivery Methods and Technology**
- **Identify Facilitators / Trainers**

Learning Objectives

A lot of training skips this step and goes right to development. This is like building a house without blueprints. Take the time to design your training first. This is the time to identify the learning objectives, the learning activities for each learning objective, and then the assessment test /demonstration for each learning objective.

Get your project team in a room and facilitate the discussion to identify the learning objectives: “What do we want our reps to be able to **DO** after the training?” The emphasis is on **DO**. Learning objectives are action verbs. They are observable, measurable, and repeatable. Avoid using words like “understand” or “know” which are subjective and difficult to quantify, observe and measure.

Remember	Understand	Apply	Analyze	Evaluate	Create
Identify	Describe	Apply	Analyze	Evaluate	Create
Define	Explain	Demonstrate	Compare	Judge	Design
List	Discuss	Implement	Contrast	Argue	Develop
Repeat	Locate	Execute	Differentiate	Defend	Modify
State	Paraphrase	Solve	Separate	Support	Assemble
Recall	Articulate	Develop	Examine	Conclude	Compose
Reproduce	Restate	Interpret	Classify	Criticize	Produce

Here are a few examples of common learning objectives:

Learning Objectives

At the end of this training the attendees will be able to do the following:

- Describe an insight that provides new information to a customer/prospect
- Ask effective open-ended probing questions to uncover needs of the customer /prospect
- Identify solutions to the needs uncovered
- Describe a key competitor's solutions, their value propositions, and weaknesses
- Demonstrate how to overcome common objections in a role-play scenario
- Compare and contrast widget A with widget B
- Defend the claim that widget A provides better results that widget B using scientific research studies

Learning Activities /Assessment /Delivery Methods / Facilitators

Facilitate this activity and take your time with the team involved in establishing clear learning objectives. Once these are clearly defined you are now ready to make the training activities, performance rubrics and assessment tool. Use a simple design document that includes minute by minute breakout of activities.

Design Document

Learning Objective		• Demonstrate how to overcome common objections in a role-play scenario		
Time	**Learning Activities**	**Media**	**Facilitator(s)**	**Assessment**
10 min	**Best Practice Sharing:** • Interview successful sales reps and share effective talk tracks	Distant: eLearning module	N/A	Performance Rubric used by Observer (1-5 effectiveness rating with comments)
45 min	**Triangle Role Play:** Sales Rep/Customer/Observer • 10 min role play • 5 min Observer feedback /discussion • Rotate and repeat	Classroom: Create role play scenario- interview key sales reps. Put on PPT slide with instructions.	Sarah M.	

- Subject Matter Experts (SMEs)
- Distant Learning: eLearning and Videos
- Classroom Training Workshops
- Workbook
- Facilitators' Guides

Leveraging Your Subject Matter Experts (SMEs)

Developing content takes the most amount of time. You now need to create training materials and activities for each performance objective. This is where you truly need the support of the SMEs on your project team. Interview the sales reps and collect real-life selling scenarios to create role plays, case studies, best practice sharing, and if possible they can help facilitate some of the workshops. New and existing reps like to learn from their successful colleagues. The product managers should have the core content on your company's solutions, PowerPoint slides, videos, and Word documents. It is time to convert this content into actual learning materials such as eLearning modules.

Distant Learning: eLearning and Videos

eLearning is a key to ensuring active learning in your training. Remember you want to minimize passive PowerPoint presentations of content in the classroom. You can create eLearning modules that contain core products, onboarding, and selling skills content. The sales reps can absorb this content prior to the classroom training.

eLearning modules provide a consistent presentation of information that can be viewed over and over. Built in knowledge checks (tests) can be embedded into the eLearning modules as well as documentation of who successfully completed the modules. This builds in accountability for the trainees to do their "homework" prior to attending class.

Long-Term Memory
- 80% Seeing and Doing
- 20% Reading
- 10% Listening

For ongoing training and development of your existing salesforce, eLearning is ideal. 80% of today's training is still delivered via the classroom (Brainshark). For very busy sales reps, inside or outside, providing engaging, trackable and concise eLearning modules or videos can ensure ongoing learning in fast-paced competitive environments. Classroom training is also expensive. IBM cut their training costs in half. "Before video, 40% of training expenditures came from travel and lodging." (IBM Case Study). Microsoft saved $303 per employee on training leveraging eLearning and video. (Microsoft Case Study).

According to The Brevet Group, 80% of learning that goes into our long-term memory comes from seeing and doing, 20% from reading, and only 10% from hearing. eLearning and videos are a fiscally sound investment in your companies sales training.

Classroom Training Workshops

The focus of these workshops should be on selling skills. If you created effective eLearning modules for the home study, your classroom can consist of active learning exercises such as role-play, case studies or hands-on where the sales reps can practice and apply their new knowledge in real-life problem-solving scenarios. They can focus on learning and practicing their selling skills and receive feedback and coaching from the trainers.

Most companies focus a lot of time on product training. While it is imperative that the sales reps have a proficient knowledge of your company's solutions you can provide an interactive overview of the products and services in the classroom which might include games, facilitation, hands-on, Q&A and then move to active learning activities sooner where the higher levels of learning occur.

Remember, you created the design document for a reason. Although there is always room for new ideas and improvement, stick to your design document. This is where all the upfront work and following the ADDIE instructional design model will pay off. You are not "winging it" any more.

Workbook

Create a workbook for the trainees containing all the learning activities in sequence such as role-play scenarios, case studies, and activity instructions. Leave plenty of room for note taking. You can also insert the agenda, high-level product knowledge, market overview, and selling skills information such as insight statements, effective open-ended probing questions, effective responses to common questions and objections, and value propositions. This workbook serves as a guide for the training and as a post training resource.

Facilitators' Guide

If you have facilitators delivering the classroom training make sure to create a simple, clear step-by-step facilitators' guide. Do not assume they will understand your vision of the training design. Pay attention to all the details. Then conduct a train-the-trainer in person or via webinar. Even if you believe that you have successfully "passed the baton" be sure do a final run-through before the classroom training.

- **Launch Distant "Home Study" Pre-Read**
  - **eLearning**
  - **Webinars**
- **Train-The-Trainer**
- **Classroom Training Execution**
- **Setting Expectations**

Home Study

Home study is most successful when your sales reps can absorb as much of the content as possible before the actual training begins. They can engage in active learning exercises to **Understand** and **Apply** the new knowledge at a much higher level when they have been exposed to, and begun to internalize, the content.

Provide simple, specific step-by-step instructions of the home study. If the home study is sent digitally include a PDF or Word document of the instructions with clear "READ ME FIRST" at the beginning of the email. Provide the link to the eLearning modules. And make sure that the trainees have a realistic amount of time to successfully complete their home study. Do not send it to them on a Friday when the classroom training begins on Monday. Two to three weeks is an ideal home study timeframe. Be sure to give ample time for scheduling all other pre-training related activities including calls with management, webinars and assessments.

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Home Study

Expectations:

- Complete by 5/28/2017 prior to attending classroom training
- Earn 85% or higher on tests

Instructions:

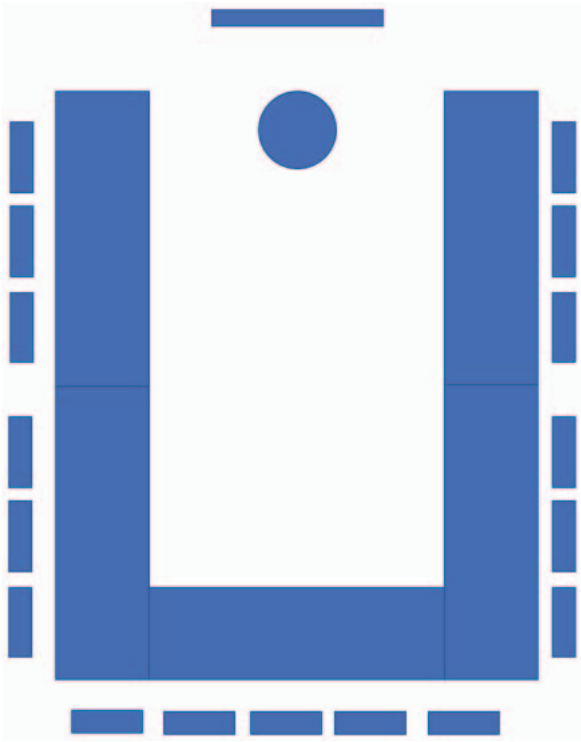
- Read "READ ME FIRST" Word document
- Click on this link to begin the 5 eLearning modules
  Home Study eLearning Modules

Train-The-Trainer

If you are bringing in veteran sales reps, sales managers, or any subject matter experts from marketing or other departments make sure you conduct a simple, clear Train-The-Trainer via webinar, live or both 1-2 weeks prior to the training. Schedule regular check ins to ensure that they understand their role and responsibilities. I cannot tell you how many times the trainers said that they were all set and ready to go only to ask me the morning of the training what they were supposed to do. Arranging a pre training run-through with trainers one day prior to training with senior management present can improve preparation and performance immensely. Believe me, they will be paying attention.

Classroom Training Execution

Show time! Make sure your training room is set up and all the technology is working. If the training begins on a Monday and it occurs at the headquarters, reserve and set up the room on the preceding Friday. If training is at a hotel, see if you can set up the night before, or very early in the morning. The last thing you need is to be rushed before the trainees arrive. Depending on class size, u-shape or rounds are optimal for active learning collaboration. Avoid lecture “theatre” room set-up.



U-Shape Room Set-Up for Active Learning Collaboration

Setting Expectations

It is imperative that sales leadership set clear expectations for their sales reps prior to the launch of the home study and the classroom training.

Metrics to Determine Training Effectiveness:

- **Reaction**
- **Knowledge**
- **Behavior**
- **Impact / ROI**

Post-Training Reaction Survey

How effective was your training in the eyes of the trainees? They will provide you valuable input as to what went well and areas for improvement. Create a simple rating survey with room for comments on each section of your training. Set aside 15 minutes on the last day of training for them to complete the survey. Do not let them leave and complete it later.

Knowledge Tests and Performance Rubrics

These are the assessments used to measure each learning objective. The knowledge testing can be formative, or given after each training section, and summative which is given at the end or a cumulative /final exam. This testing of the rep's knowledge is usually basic multiple choice, fill in the blank, and essay.

The performance rubric is used to measure sales rep demonstrations such as role-plays, presentations, and hands-on activities.

Performance Rubric					
Trainee Name					
Topic					
Evaluator					
CRITERIA	1= Low 5= Exceptional				
(Insert criteria here)	1	2	3	4	5
Evaluator Feedback:					
(Insert criteria here)	1	2	3	4	5
Evaluator Feedback:					
(Insert criteria here)	1	2	3	4	5
Evaluator Feedback:					
(Insert criteria here)	1	2	3	4	5
Evaluator Feedback:					

Behavior Changes

A primary purpose of training is for sales reps to implement desired behavior changes to improve performance and drive sales. **Post-training coaching and reinforcement from sales management is the key to behavior changes**. The role of the sales manager is integral to the success of the organization from the training perspective. Without effective coaching, encouragement and support the new knowledge and skills acquired from the training will fade and the training becomes a waste of time and resources. The desired behavior changes need to be clearly defined and communicated with specific expectations to the sales reps.

How do you measure behavior changes? Inserting these behaviors in an **outside sales co-travel form** and **inside sales call form** will create accountability and can be used as coaching tools. Sales management needs to observe the sales reps making sales calls to determine the level of demonstrated behavior changes that they learned from the sales training and provide coaching and reinforcement to embed the behavior changes and improve sales performance.

Although behavior changes can take time, collecting and assessing the outside sales co-travel and inside sales call forms at **three months** post-training to evaluate the level of behavior change builds accountability and motivation into the process.

Impact / ROI

What increase in sales has occurred that can be tied directly to the training? This can be difficult to measure, but the purpose of sales training is to change behavior and, in turn, drive sales. Impact can be measured over the 3-6 month period post-training. It is important to have a consensus prior to the training with sales leadership on these metrics.

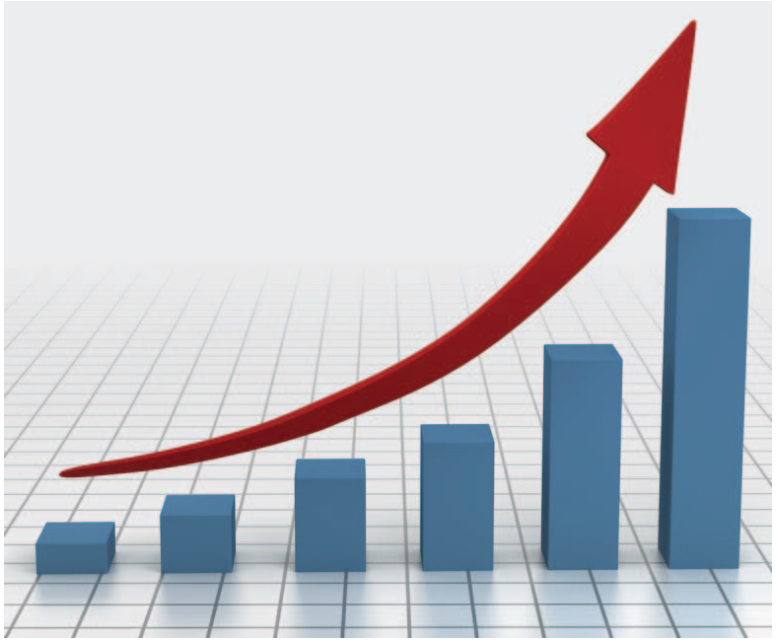
Determine the criteria to measure such as a new product launch, product line extension, etc., prior to the sales training. Examine these reports on a weekly basis for **three months** to determine sales and sales trends by criteria category and each sales rep.

At the end of the third month conduct an **Impact Survey** with the sales reps who attended the training and ask them the following:

1. On a scale of 1-10 to what degree of confidence can you tie your sales of "X" to the sales training (1= very low confidence / 10= very high confidence)?
2. Quantify a total dollar value to **incremental sales** of "X" as a result of the sales training. Describe how you determined this figure.
3. Describe three specific examples in detail of prospects or customers you closed incremental sales as a result of the sales training.

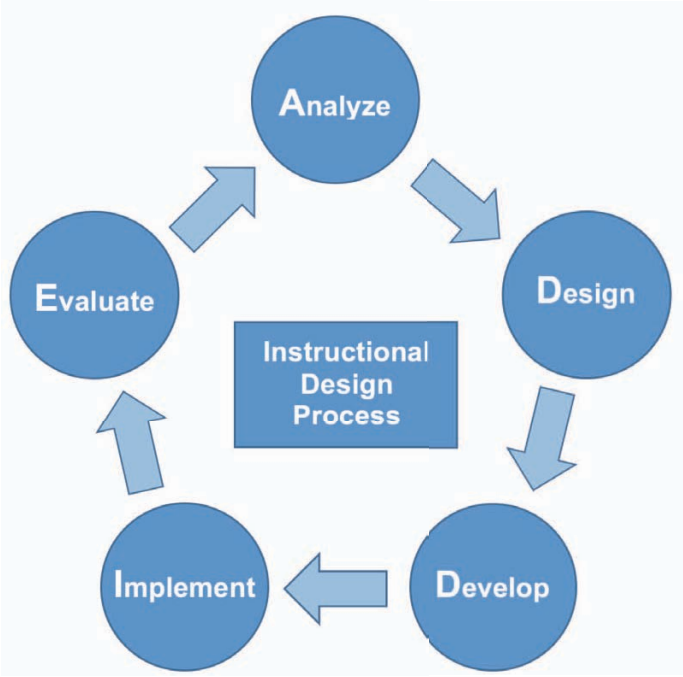
Determine the amount it cost to execute the sales training from the budget spreadsheet. Add up the total incremental sales amount from Impact Survey question 2.

Incremental Sales
- Sales Training Cost
= Return On Investment



Start the ADDIE Process Over

The ADDIE process is intended to be cyclical. If you intend to repeat the training again you can examine the feedback from the trainee's reaction survey in the **Evaluate** stage and the trainers / facilitators, then begin the ADDIE process again in the **Analyze** stage to improve training.



New hire training, for example, can be in a perpetual state of improvement by using ADDIE. Of course, the intention is to have as much of the training static and consistent, but with the ADDIE instructional design process flexibility is built in for enhancement and continuous improvement.

The ADDIE process can also be used for supplemental, ongoing development workshops for existing sales reps. It is important to constantly conduct needs assessments to uncover product knowledge and selling skills gaps. Whether these more frequent 1-hour or half-day sales training workshops occur on a weekly, monthly, or quarterly basis, following the ADDIE process to create your training and active learning strategies will ensure effective learning.

Effective Sales Training Impacts Your Business

Instructional design, active learning with metrics, eLearning and ongoing coaching and reinforcement of sales training to ensure desired behavior changes are the key ingredients needed to develop confident sales reps who can effectively prospect and grow existing business. Reinventing sales training is not only possible, but necessary in order to realize the ROI of developing your inside and outside sales reps and achieving sales targets for your organization.

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Owner & Principal, Hayden Education

Patrick Has worked in sales and sales training for over 20 years mostly in medical device.

Patrick was consistently in the top 10% and a two time "President's Club" winner as a top performer. As a mentor and teacher to new sales reps, Patrick was a Field Sales Trainer for new hires and conducted many training classes at National Sales Meetings on products and selling skills.

As a Senior Training Manager and an educator for a medical device company, Patrick was the first ever North American recipient of the Straumann "Global Simply Doing More" Award for his comprehensive design and development of the New Hire Training Curriculum. A certified *Challenger* Sales Trainer, Patrick is proficient in many sales processes. With a passion for behavior change and impact, Patrick believes that effective sales training through engaging active learning workshops and leveraging interactive eLearning drives sales. Patrick Hayden's unique combination of skills as an instructional designer, content developer, sales process expert, and high impact sales trainer will help your organization achieve it's growth goals.

Patrick earned his Masters of Education in Instructional Design from the University of Massachusetts. In collaboration with his business partner, Tamara Niedzolkowski, Patrick created Insight Solutions Selling™, a forward thinking and effective sales process that combines question-based and insight selling. He facilitates his classes with enthusiasm and humor, and knows that adults learn best in a positive environment where they are engaged, interact, and can apply what they learned effectively after the training.

"To improve is to change; to be perfect is to change often."

~Winston Churchill

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