

# Planning a Sales Training Program

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Due to the significance of sales to profits, sales training receives considerable attention in most organizations as a major category of instruction. Yet there are as many different approaches to sales training as there are philosophies of how to sell. While companies frequently spend lots of money on sales training, the results all too often fall short.

Since I'm an instructional designer by profession, one who specializes in sales training, over the years I've worked intimately with many senior-level sales, marketing, and training executives, across a wide variety of industries. All of them are dedicated to helping their organizations achieve maximum sales productivity and growth.

Often I've been privy to after-hours, closed-door strategy and planning sessions where previous successes and failures of sales programs have been openly and candidly dissected, rehashed, and analyzed.

It's been my observation that the most successful companies consistently recognize and use the concept of best practices as a competitive advantage in developing and implementing their sales training.

This is the first article in a four-part series I've written for Corporate University Review on sales training best practices. The initial three installments focus on the major development phases of corporate sales training performance improvement efforts: planning (the piece you're reading now), formal instructional design, and installation. The fourth and final article tracks the life cycle of a sales training program upon its introduction into the organization.

In all of these articles my emphasis is on those best practices that the most savvy, forward-thinking companies adopt to maximize the success of their sales training programs. The information I'll provide comes from three sources:

- Anecdotal feedback collected during an informal survey I conducted on sales training best practices.
- Comments from numerous clients and colleagues.
- My own thousands of hours of work in the field.

## The Top Seven

There are many best practices which can help sales training yield more substantial results. The list provided here is not meant to be comprehensive. However, it should give you a good idea about the range of best practices that those who are serious about achieving enduring performance improvements in their sales force can consider.

You'll also notice there can be significant overlap between best practices, their positive consequences frequently producing a ripple effect.

## Best practice #1

**Identify and attack the most important and pressing sales training needs first.** This is best practice #1, without question. To be effective, sales training must be based on a realistic analysis of performance requirements. That is, the level at which sales people are currently functioning vs where you require them to be.

The best way to do this is to conduct a needs assessment that can be as simple and informal or as complex and formal (job task analysis, performance gap analysis, root cause analysis, etc.) as you want to make it.

I won't go into the in-and-outs of conducting a sales training needs assessment now, but will just observe that the analysis should address a variety of topics, such as who needs to be trained, their existing knowledge and skills, the environment in which they will engage in sales training, and what job performance will be expected of them after sales training is finished.

There are any number of sources from which you can draw to gather needs assessment information, including your own knowledge and awareness of the sales training situation in your organization, the sales training population, customers with which your salespeople work, and sales management.

For example, Joanne Irish, New Technologies Training Manager at BMW of North America, emphasizes meeting with salespeople up-front to discuss all pertinent issues, such as past sales training experiences, current sales practices, and so on.

## Best practice #2

**Develop proprietary sales training solutions based on your specific organizational requirements.** If possible, avoid using an off-the-shelf, generic, "one size fits all" sales training package. Customization for your organization may be very basic, involving modifying packaged training, such as adding local color (background, customer scenarios), or adjusting emphasis (highlighting or de-emphasizing key topics). Or it can be as complex as hiring a professional instructional designer to develop custom sales training courseware from scratch.

## Best practice #3

**Decide up-front how you're going to manage and staff sales training development.** All sales training development should begin with the assignment of a dedicated project manager. This is the individual who has the ultimate responsibility for making sure that everything happens the way it's supposed to happen, on time, within budget, and at an acceptable level of quality. This person functions as the project's champion.

If you're working with outside vendors, you should expect that they have their own existing project management system and that it's compatible with yours. You're also entitled to insist that they can articulate and follow their project management *modus operandi*.

Plan to have the actual sales training content development tasks performed by an instructional designer, subject matter expert, or course facilitator. Depending on the complexity, scope,

and timeframes involved, sometimes one individual might assume more than one role. Conversely, sometimes multiple people may fulfill the demands of a single role.

## **Best practice #4**

**Provide the appropriate means for delivering the right sales training content in the right way.** At minimum there are three content areas which must be covered, to one degree or another, to maximize the effectiveness of sales training which addresses relatively simple one-call close sales situations. These are:

- Basic communication skills (questioning, listening, etc.).
- Basic sales skills (building rapport with customers, handling objections, etc.).
- A framework within which to explore communication and sales skills: a sales process.

In more complex selling environments, such as those involving extended multi-call sales cycles, proficiency in up to six major content areas is necessary if sales training is to be really effective. These include:

- Organizational knowledge.
- Product knowledge.
- Selling strategy skills.
- Industry awareness.
- Sales support.
- Sales management.

Getting the right content to the right people obviously requires both considerable foresight and commitment, especially as delivery methods become more technologically sophisticated (2-way audio/video conferencing via satellite, distance learning, computer-based training, etc.).

## **Best practice #5**

**Lay out a game plan which will ensure adequate follow-up and support after sales training is over.** We can't assume learners will be able to apply new skills on the job unless they receive proper ongoing support and reinforcement. The best sales training programs plan for systematic follow-up to assist and motivate learners after the formal training portion of sales training has been concluded.

For example, well-designed relevant job aids, product data sheets, or checklists of points to cover with customers, are absolutely critical if we're to facilitate the transfer of knowledge and skills from the training environment to the job itself.

## **Best practice #6**

**Link sales training programs and events to key organizational/sales goals.** Sales training will have only minimal impact unless it is closely aligned with the major business priorities, objectives, and mission of the enterprise. Too often, however, sales training occurs in areas which don't contribute directly to the bottom line. Usually this occurs because of a lack of coordination and planning between departments.

To mitigate against this possibility, sales trainers, training managers, and all other relevant parties should have a solid understanding of the strategic plans and sales goals of all business units before undertaking sales training development.

## **Best practice #7**

**Get tangible and visible top management commitment and support for sales training.** The last best practice noted, but certainly not the least in terms of importance. Without top management support all is lost! Management must be willing to actively champion the sales training effort and must tangibly demonstrate its support through participation and resources.

Keep in mind that it's the responsibility of those providing sales training to make sure that management understands exactly what sales training can and should do for the organization and its bottom line.