Make Sales Learning
Transformative

Focus performance improvement to drive business outcomes

Transformative

Transformative doesn't have to be a scary word. If the word "transformative," in the learning context, conjures up images of expensive consulting, followed by a litany of operational projects [*including* sales training], then let's redefine the term to one that isn't so daunting. If we cobble together some phrases from the web "transformative" at its basic definition is "…an experience or learning event that inspires change or a shift in viewpoint." It is a marked change for the better.

By this logic, learning that is transformative is characterized by *true change in behavior* not by the complexity of the change initiative itself.

Why Focus on Behavior Change?

Many Sales or Learning & Development organizations seek to train their sales professionals so that they gain required knowledge in a particular area. In many cases, the overall training engagement was paid lip service and deemed successful if key business outcomes or results were eventually, [somewhat] achieved. This excludes a minority of training departments who measure success solely on whether the training event was entertaining or if the course evaluations were all "9s or above".

According to CSO Insights, although virtually all organizations measure business results, most (<30%) don't use measurement data from sales pipelines to help measure/direct progress and even less (<10%) actually measure behavior change.
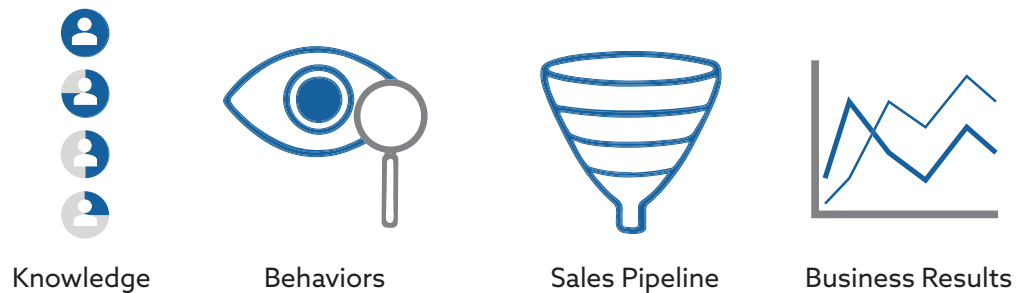
The Knowledge-Application Gap?
Or The Knowledge-Behavior Change Gap?

Over the last few decades "best practices" have stressed the importance of applying what it is one learns. Studies have been cited that show if learners don't apply what they learned in a formal training session soon after the training event they'll lose half of that knowledge in a few months. To counter this, enablement tools and continual learning initiatives have been created to help with the application of specific concepts back in the field.

So, clearly there is consensus that application is critical to achieving business results; however, along this path to achieving business results a shift in emphasis should evolve to consistent application with expected, noticeable *behavior change* as a result.

In a previous white paper, we introduced the Sales Talent Performance Measurement Framework™. This framework depicts four foundational pieces of measurement data for sales development initiatives. Behavior is the lynchpin between required *Knowledge* and desired outcomes in the *Sales Pipeline*.

Sales Talent Performance Measurement Framework™

Knowledge	Behaviors	Sales Pipeline	Business Results

With this in mind, SPI has taken actions to ensure our approach to learning has an even stronger focus on behavior change…and in such a way that it lends itself to more immediate forms of measurement that will link specifically to business results.

Step 1 Identify Critical Sales Competencies™ and skills within our market place for key sales roles (competency model: part 1)

Step 2 Identify Observable Behaviors at four distinct proficiency levels for each competency (competency model: part 2)

Step 3 Develop Curriculum aligned to the competency model

Step 4 Create Learning/Action Plans that include curriculum and activities (and frequency) intended to drive desired behavior change (as evidenced by observable behaviors)

Step 5 Create Inspection and Coaching Processes and plans that help managers drive the desired behavior change

Step 6 Implement Methods to Monitor and Track the execution of plans and activities within a learning/talent management platform and related business metrics
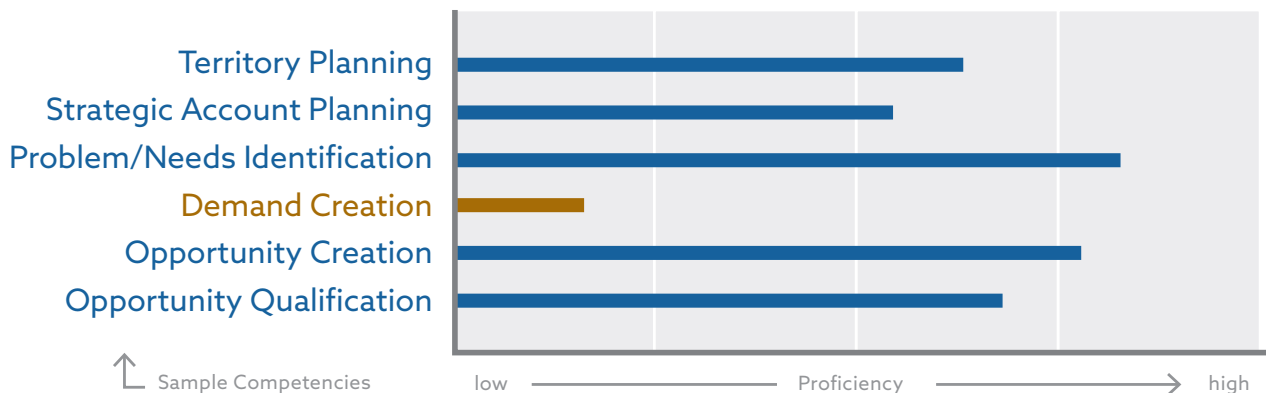
1 Identify Critical Sales Competencies™

We identified over 20 core competencies important to sales, sales management, marketing and sales support roles.

Each of the competencies include skills in which someone can be trained for noticeable improvement. In other words, not just a list of characteristics that you hope a sales professional would possess (e.g. self-motivated) but rather an area where someone can apply a concept, model or tool that provides structure around achieving desired behavior change (e.g. demand creation).

Additionally, having a competency-level view of what needs to improve allows organizations to identify areas of particular need (perhaps through an assessment) and then focus training and reinforcement efforts around a manageable set of competencies in a given period of time.

Identify critical sales competencies: Example Assessment Results

Sample Competencies	Proficiency (low → high)
Territory Planning	
Strategic Account Planning	
Problem/Needs Identification	
Demand Creation	
Opportunity Creation	
Opportunity Qualification	

2 Identify Observable Behaviors

Proficiency levels identify the level of mastery of each competency. For any sales role, each competency has a target proficiency level that identifies effective performance and success for that role. Target proficiency levels help organizations identify individuals who have not yet attained the target level, and provide development (action) plans to help them achieve the target.

Proficiency levels are incremental and additive, meaning that any one level is inclusive of all other preceding levels.

Observable behaviors are action-oriented outcomes that can usually be directly witnessed or inspected to ensure satisfactory completion. Often there are quantity and quality factors in ascertaining if behavior change has sufficiently occurred.

Example: Identify Observable Behaviors - Demand Creation

Proficiency Levels

Observable Behaviors

Mastery
Assists others with demand generation activities.

- Proactively updates demand-generation tools and techniques
- Provides guidance to others for generating demand/prospecting into makets

Proficient
Consistently uses demand generation to increase the number of opportunities.

- Refines business development messages based on market trends.
- Identifies and stimulates interest directly with decision-makers.

target proficiency level

Applying
Applies demand generation behaviors in the field.

- Uses online resources for identifying and tracking business issues.
- Uses business development messages for stimulating interest.

current proficiency level (low mastery)

Foundational
Ability to apply demand generation tools in a learning environment.

- Recognizes where demand generation activities take place in the sales process.
- Articulates how to leverage research to identify business issues within a market.

3 Develop Curriculum Aligned to the Competency Model

Many L&D organizations are tasked with creating internal sales training programs, or they engage an outside training firm. In both instances, programs are deployed with a goal to improve sales skills to help address perceived business problems or selling deficiencies. These may include holistic programs such as consultative selling, strategic selling, insight selling, and Solution Selling®. Although these methodological training programs contain a slew of best practices that often span many selling competencies and skills, they often have a lot of content intended to address many selling deficiencies at once – and that's the challenge – they may have more content than needed. The design is often not inherently aligned to a competency model.

To address the need for a focused, agile approach to learning, lengthy programs and courses must be restructured and broken down into smaller more manageable training modules to better align to the critical sales competencies required in the marketplace. For example, the Solution Selling® Sales Execution course, which covers a spectrum of critical sales competencies, can be parsed into content aligned to specific competencies such as demand creation, sales conversations, value selling, collaboration, and negotiating, etc.

4 Create Learning/Action Plans

Traditionally there has been a mindset by both performance improvement firms (including ourselves) and learning and development organizations to make the best use of "out of the field" time for sales professionals. This is why the "fire hose" approach to training evolved. "We better give them all we can fit into the three day, live training event since we won't have them for another 6-12 months."

However, with the continual advancement of technology, learning is no longer relegated to the big event, but rather should be treated as a continual engagement across a spectrum of modalities. Knowing that learning is not a cram session, organizations can now focus on transitiong to specific competencies, one at a time. This means that providers of methodological or skills training need to ensure their courseware is configured in such a way that it is more granular and can be consumed in a variety of manners (micro-learning).

It also means that learning must occur over time if true behavior change is going to be achieved. The need for action plans that can drive this desired behavior change is becoming more and more important.

Curriculum

- ☑ Complete online course
- ☑ Complete knowledge test
- ☐ Attend 1-day ILT workshop
- ☐ Attend follow-up webinar

+

Action Plan

- ☑ Identify decision-makers within target markets
- ☐ Research targets to gain additional information
- ☐ Monitor targets
- ☐ Review multi-touch plan with manager

5 Create Inspection and Coaching Processes

Not only do sellers have learning/action plans they need to execute, but their sales managers should oversee the execution of the plan, and the quality of the execution. Therefore, sales managers need sales tools and resources to drive consistent inspection to ensure that desired behavior change is being exhibited.

Example: Demand Creation Checklist (for managers)

Has seller created a formal plan to identify potential markets?	**(Yes)**	Partial	No
Do identified targets have highest business value?	Yes	Partial	**(No)**
Can seller provide evidence supporting target decision?	**(Yes)**	Partial	No
Has seller identified methods for monitoring those targeted?	Yes	**(Partial)**	No
Is seller conducting research to understand target?	**(Yes)**	Partial	No

6 Implement Methods to Monitor and Track

Most learning and talent management platforms have capabilities that allow for the creation and provisioning of individual learning plans comprised of specific courseware (tracked by course completion) and actions (deemed complete by someone given administrative approvals).

Conclusion

Sales Performance International's 6-step approach to bridging the knowledge/behavior gap creates transformative learning experiences that ultimately lead to performance improvement to drive business results. This proven method works because it creates a practical, focused process that starts with required knowledge and drives toward achieving strategic goals in a logical, systemic way.

Determined to make new sales methods a reality, our client [a global overseas cargo carrier] conducted an assessment within their global sales organization to identify the critical competencies analytics determined were weak, but essential, to achieving their aggressive business goals. Next they embarked on a prioritized program to help salespeople master three of seven core competencies identified at a low proficiency level. These included demand creation, value selling and consultative dialogue.

We worked with our customer to define detailed curriculum and action plans for both their sales and sales management professionals aligned to developing the focused set of competencies. Plans included the application of tools in real customer situations. Sales managers would be responsible for inspecting execution and confirming the completion of required activities. They took an incredible amount of ownership for ensuring their people were executing against the corporate objectives.

In their revitalized approach, the goal was to ensure the salesperson gets 'in the door early' to shape the decision-making criteria, and adds value by thoughtfully exploring key business issues in collaboration with the customer. According to the leader of Sales Effectiveness, "We needed to help customers consider issues they hadn't thought about before — new ways to improve their business."

The goals were measured to ensure success. "We looked at multiple business metrics, including concrete behavior change in customer interactions, impact on the sales pipeline, and impact on the business as a whole. Our sales transformation initiative achieved an approximately 350 percent ROI. That's a profit of many millions, but what's most important is that we have fundamentally changed the dialogue with the customer."

Learn more at **www.spisales.com**

About the Authors

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Jimmy has over 20 years of expertise in the learning and development space dedicated to sales professionals. He currently leads and manages the ongoing development and updating of sales and sales management best practices including curriculum from the Solution Selling® Suite. Part of his expertise lies in ensuring learning can occur across a global footprint through a variety of learning modalities and supporting technologies relevant to today's spectrum of adult learners.

Jimmy has not only worked across the globe with large multi-national organizations such as IBM, Microsoft, Philips, Maersk and Nike but he is also an author and contributor to several professional publications. He co-authored *The Solution Selling® Fieldbook* with Eades and Sullivan. He holds an undergraduate degree in English from UNC Charlotte.

Rick Judson, Director of Learning Technologies

Rick Judson is the Director of Learning Technologies at Sales Performance International, where he's responsible for the development and deployment of the company's learning technology and platforms on a global basis. He has over 20 years experience in training, e-learning development, business communications, and project/client management. Rick holds a BS and MS in engineering from Purdue University, and is experienced with applying a range of adult learning methodologies and technologies.

About Sales Performance International

Sales Performance International (SPI) is the world leader in sales performance optimization. Our collaborative, best-in-class approach to working with premier global companies—supported by multi-year, independent research—demonstrates that SPI's proven methods enable our clients to consistently and effectively drive revenue growth, operational performance improvements and accelerate their time-to-results.

SPI offers the industry's only comprehensive Sales Performance Optimization Platform, comprised of three integrated components; talent assessment and analytics, continual learning and development, and sales enablement technologies. Our extensive sales performance expertise, deep industry knowledge, and global resources, uniquely position SPI as the go-to firm for organizations that need to adapt and transform how they sell in a disruptive and increasingly competitive world. Founded in 1988, SPI has assisted more than 1,200,000 sales and management professionals, in more than 50 countries, and 14 languages, achieve higher levels of performance.

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