Improving Performance

AS WE LEARNED in last month's FaxForum results, the present interest in performance is not a passing fad. It is arguably the most important aspect of training because without measurable performance, our credibility as trainers—and our longevity—is in jeopardy.

This month, "Training 101" looks at two very different performance objectives. The first article by Robin Peterson uses the career life cycle model to pinpoint where sales representatives are in their careers and productivity levels, so that any training given to boost performance is specifically targeted to their needs. In the second, James Sullivan shares a game that enables facilitators to take the performance pulse of small groups in a nonthreatening but productive way.

PINPOINTING TRAINING NEEDS WITH THE CAREER LIFE CYCLE

ROBIN T. PETERSON

EVERY YEAR companies spend millions on training to help members of their sales forces become more productive. But how are these dollars best spent? Most sales managers know that the entire sales force—not just new inductees—need training. Further, most would agree that the training needs of experienced performers differ from those of novices. But what specific kind of training should each sales rep receive? The career life cycle helps answer this question.

Each sales representative goes through a career life cycle with these four stages: preparation, development, maturity, and decline.

Not all members of a sales force will move through the cycle at the same pace. Some may get stuck and spend considerable time on one or more stages. Others may jump quickly from one to another. Thus, the sales manager should identify the stage where each sales rep is located, in order to determine his or her training needs.

Preparation. New sales representatives are in the preparation stage. Their sales levels normally are small but growing at an even pace. Their learning needs are substantial if they are to progress to more productive stages.

During preparation, new members of the sales force require considerable training about the company, the product, target customers, and how to sell. Their insight into these subjects contributes to their productivity and justifies the high cost of recruiting, selecting, and training them so that they might contribute to the firm's profits. Most training programs for newcomers focus on these basics. Trainers teach them with a combination of lecture, home study, role playing, and simulation.

Many training programs for the preparation stage neglect one important area—the attitude of the newcomer. If they are to be successful, new recruits need to develop an attitude that includes enthusiasm, maturity, persistence, and service to customers. If not already present in new salespeople, these qualities must be taught.

On-the-job coaching is usually the best way to impart favorable attitudes. And the success of this effort depends almost entirely on the attitudes of the coaches. If they are genuinely enthusiastic, mature, persistent, and anxious to serve customers, trainees will tend to pick up these traits. Conversely, negative attitudes of coaches migrate directly to trainees. Coaches must be carefully selected and trained if they are to function effectively.

Development. During development, sales are rising rapidly. The new recruits have acquired the insights and attitudes needed to move ahead quickly. Their success builds enthusiasm, which usually translates into further success. As their customer base expands and they gain confidence, they learn what works and what doesn't.

In the development stage, sales representatives require training on how to apply the knowledge received during preparation. Now much of the training focuses on how to solve day-to-day problems; it emphasizes how to stay productive and not to backslide.

Role playing on videotape is especially useful during development. Representatives simulate an actual selling experience with a make-believe prospect. In turn, sales reps and their superiors can play back the tapes and look for mistakes and areas of strength and weakness. A useful practice is for sales managers and reps to view the tapes together and to discuss their reactions. Often one party misses points detected by the other. Disagreements will sometimes arise, but discussion of these can lead to useful ideas of how to improve the rep's performance.

Maturity. At maturity, the sales representative's productivity levels off. Sales rise only slightly, peak, and then begin to fall. This phenomenon is widely referred to as "plateauing"—a condition of stagnation, which eventually leads to decline.

There are many conditions that can lead to plateauing. Sales reps may feel that they lack opportunity for advancement. Some are bored with the job, overworked, or burned out. The rep may be making sufficient money and sees no need to strive for more. Some may feel that they are unable to keep up with new technology.

To overcome plateauing, training should emphasize motivation. Sales

managers should strive to inject new energy into the sales force. Motivation sessions, especially those conducted by outside experts, can be of real value here. Smaller firms that are not in a financial position to bring in experts for on-site presentations can send plateaued reps to motivation sessions conducted for larger groups, or can purchase video and audio tapes produced by experts.

At maturity, sales reps can use information on new products and selling techniques. The company can convey new product information through standard methods, such as printed materials and lectures. It can introduce new selling techniques in sessions where sales reps hear descriptions of the techniques, see them demonstrated, and role play them. Discussion groups, where reps discuss the techniques, can be useful as a follow-up. The discussions allow the reps to fine-tune applications and share ideas on opportunities and problems.

Decline. Decline in achievement signals the stage where productivity is falling. The reasons include less interest in the work, fatigue, and interest in matters unrelated to work. At this stage, training should emphasize improving the morale of sales representatives and showing them how they can operate more efficiently (maintaining or increasing productivity without increasing the level of effort expended).

Often the company can use salespersons who are in the decline stage as sales trainers. These individuals can employ their considerable experience to train reps who are at earlier stages. The prestige of being a sales trainer may also be what is required to pick up the productivity of sales representatives whose achievement levels have fallen.

Astute sales managers are able to detect signs that sales representatives are nearing the end of development or maturity. These managers can use training designed to offset movement into maturity or decline. Individuals do not necessarily fall into the decline stage, of course. Many remain at the development and maturity levels throughout their careers and are top sellers when they retire.

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IMPROVING SMALL GROUP PERFORMANCE

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CONSULTANTS, TRAINERS, and educators use small group and team activities to brainstorm solutions, build in content validity, and document acceptance of work such as performance inventories, task analyses, and written and performance tests. Sometimes group work for a common purpose is less successful than expected, partly because members have different needs and personal agendas.

Cooperative participants in small groups often ask to be reassigned away from troublemakers. The situation is confounded when there are five or six groups at work, and most are making satisfactory progress. In this case, it is disruptive to butt in, dissolve the group, and reassign members. A more productive strategy is to structure a group experience to find a positive intervention. Even if one or two small groups ultimately must be dissolved and reformed, the decision is easier when it can be based on data generated by everyone involved.

One way to get this information is to call a break, gather everyone together, and have each person answer three questions on a 3 x 5 card. To ensure that individual responses are free from the influence of a group discussion, this should be done after problems arise, but before small groups are reconvened.

Procedure

Tell the group you want to check out how the group process is working. Ask them to put their group number in the upper left-hand corner of the card and then answer three questions. There are no names or identification marks on the cards. Assure that individual responses are anonymous, and that group affiliation will not be identified with a specific response. To facilitate the activity, the questions can be written on a board or flipchart. Here are the questions:

▶ What is the major strength of your group?
▶ What is the major weakness of your group?
▶ On a scale of 0 to 10, how would you rate your group on its effectiveness to accomplish its purpose? (This rating is then written in the upper right-hand corner of the card.)

Cards are collected and sorted by group number. Then the numbers in the right-hand corner are added and divided by the number in the group to arrive at an average group response to question three. Put this number on the first card for the group. Keep the cards for each small group together and arrange the ratings from highest to lowest. This takes no more than five minutes.

Debriefing

Debriefing is the critical part of the activity. Often we take part in an education experience, but its meaning, the feelings of participants, and its application to real-world situations are ignored or glossed over. Start the debriefing by sharing the data. First, write group averages on the board, from highest to lowest, but do not reveal which group they came from. Next, read representative strengths and weaknesses from the highest scoring group, then move down the scale to read from those for each succeeding group, ending with the group with the lowest average score. Notice that everyone is paying attention. They listen most intently to the comments for high- and low-rated groups.

Typical strengths given by members of groups that have a rating of eight or nine are "We like to work together," "We respect each other's ideas," and "We are all focused on what the committee has to get done." Typical weaknesses given by members of high scoring groups are: "It seems to take us a long time to get started," and "It took us awhile to get to know each other's strengths and weaknesses."

At the low end, typical strengths given by members are: "Different people in the group seem to have a lot of talent," "It is obvious that several members have leadership ability," and "I think we have good members on the group." Typical weaknesses

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include: "Some of our group members have strong opinions," and "There is lack of cooperation."

Check out feelings

After a brief review of the strengths and weaknesses given on the cards for each of the small groups, ask the entire group "to check out their feelings." This step is important. Caution must be exercised not to embarrass anyone. Tell the group that everyone is welcome to make comments, but nobody has to. As comments are given, write them on the board or flipchart. Statements commonly refine the strengths and weaknesses given on the cards. Some speak strongly in support of their group, some express mixed feelings about individual participation, and some may even express open frustration with the group process in general.

As individuals begin to share experiences, and others agree and make additional comments, an intuitive understanding seems to emerge about how well various groups are functioning, even though they are not identified in the data. It is important here to repeat the promise that group affiliation and ratings given on the cards are confidential. This affirmation of anonymity seems to encourage the confidence to express opinions.

At this point, it's helpful to review the experiences that some familiar outside groups have had with this exercise, or to cite literature about how small group process is handled in various situations. For example, the *Developing a Curriculum Handbook (1985)* cites several recommendations for dealing with uncooperative behavior. These include: having the small group facilitator call attention to an individual's negative behavior; asking the disruptive participant to sit outside the group and listen for awhile; dismissing the uncooperative participant from the group; and, in a worst case scenario, acknowledging that the group is at an impasse, is not working to accomplish the task, and dismissing it.

Application

Continuing with the debriefing, ask people to explain what the ratings to question three mean, and what are some possible solutions for groups that have a low score in achieving

their purpose. At this point, those who voiced concern about their group might be expected to call for its dissolution, but that is not the common response. A more typical response is: "Well, we are still getting used to each other, but I think we should continue to work in our own groups." If the facilitator responds by asking, "Then you think it's too soon to make a value judgment about how well small groups with lower ratings on question three are working together?" this typically generates support even within small groups with low average scores. To explain this anomaly, it appears that members prefer to work within an unsatisfactory group to make it better, than to admit failure, dissolve the group, and be reassigned.

Conclusions

Typical results that follow the activity are:

◗ The activity clears the air and seems to have a settling effect on small group work. Groups seem to work better together after the activity than before.

◗ Becoming aware of group standing, even intuitively, seems to affirm high group standing and elicit an effort to improve low group standing. That is, members of a group with a rating of eight or nine commend each other for their own good work when they reconvene, whereas members of a group with a five or six rating typically say: "Well, we've been fooling around some, so now we need to get with it."

◗ Small group members seem to become more proactive to make the group work together; there seems to be a clearer focus and less reluctance to verbalize problems that prevented the group from working together.

◗ The activity seems to generate friendly competition among small groups. For example, informal conversation between members of small groups working in the same room generates comments like: "OK, our group was a little slow getting started, but now we're going to show you up."

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