

# WHAT

Would  
training  
have saved  
Willy Loman?

# Train Today,

# Sell Tomorrow

By William Powell

Remember the icon of the 1950s?: Clean-scrubbed men meticulously dressed in blue suits and felt hats, going door to door peddling their wares—brushes, vacuum cleaners, encyclopedias. And the tin men of the 1970s?: Cold-callers holed up in dank offices making endless pitches to leads unlikely to pan out. Or more recently, young men and women moving through airports, wired to the gills with cell phones, laptops, and PDAs. They are global travelers with a new agenda: sell, sell, sell until it's time to jump ship to the next hot market and sell somewhere else.

Every one of those images is as real today as it was when it first touched America's consciousness. Salespeople are still going door to door, dinners are still being interrupted (but by telemarketers), and companies in all industries (not just the tech ones)

can conquer the world,' good salespeople are in the 8 to 10 range. It makes them different from the average person in your company, who is probably a 5 and enters into a training program thinking, 'OK, there's something here for me,'" says Waterhouse. "Your high-end salespeople believe they know most of [the training already]. They believe they're more productive in front of customers than they are in the training room and that it's not the best use of their time. And they may be right. Many have a history of training classes where people did waste their time."

Jennifer Hofmann of InSync Training Synergy agrees, "Part of the problem with the sales audience is keeping their attention, because they know they could be making money [instead]. Three days out of the field is...three days without any revenue."

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now have account managers based in remote cities from Kansas to Kuala Lumpur.

Think of an industry, any industry, and it's likely that it involves someone selling a product, relationship, or solution. The sales profession is diverse in terms of the people who make their living at it, from high school grads selling cell phones out of mall kiosks to well-heeled professionals working million-dollar deals from corner offices or their cars. The question is how do you approach training in a field that not only varies greatly by industry, but also by the age, education, experience, and skills of its practitioners? With such diversity, is one approach even possible?

Steve Waterhouse of The Waterhouse Group, Scarborough, Maine, not only thinks it's possible, but it's also a necessity. There are a few things to consider first.

"On a confidence scale of 1 to 10, with 1 being 'It's not worth getting up in the morning' and 10 being 'I

Creating an atmosphere and a curriculum that command a sales professional's time and attention can be challenging for trainers. Waterhouse suggests that they approach salespeople with an attitude that lets them know training will take an hour of their time to compensate them with skills and information. "Training salespeople is more intense, more of a high-wire act, and definitely more of a value proposition than typical training," he says. "Salespeople don't start the clock five minutes before a class but two hours before, and they want to know why they haven't gotten anything out of it [in the first few minutes]."

"Salespeople want to know exactly what they need to know in a hurry," says Chris Dragon, vice president of product development for KnowledgeNet. "Whatever you can give them to make knowledge transfer happen as fast as possible makes them very happy campers."

### Primitive beginnings

Twenty-three years ago, Linda Richardson left her job as a principal in the New York City school system to head the corporate training program for a large New York bank. It was the first time she'd even heard of corporate training. And it's little wonder, she recalls, as it was an industry with few competitors. Xerox ruled the roost, and training wasn't as sophisticated as it is now.

"When I started, sales training was pretty primitive," she says, "Regardless of industry, whether you were a banker or in manufacturing, you sold insurance," a fact that broke her first rule of training: Make it relevant. "It didn't make sense to see salespeople who were responsible for selling financial solutions practicing all of their role plays around insurance products."

Richardson and her colleagues came up with a consultative approach, asking questions and positioning training to specific needs. Though it was closer to the way many companies train today, it was a far cry from the typical training of two decades ago that was, as Richardson explains, an adversarial, high-pressure approach that often degraded clients. "That worked at the time because there wasn't much competition," she says. "Salespeople didn't have to differentiate on their knowledge of a client. There wasn't much communication [either]. They just went in there and educated the client on the product."

The current sales environment is different. Salespeople no longer just sell products; they sell solutions, customer relationships, and information. Selling is no longer the sole objective. Sales reps are expected to deliver enterprise-wide solutions and a wealth of information on product lines, as well as become project managers. At many companies, salespeople are expected to train clients on the products they sell.

Still, recent training approaches aren't that advanced from the one-style-fits-all approach, attempting to apply the same methods to account managers as to IT professionals or customer service reps. But do the same rules apply? Maybe in content, but in application? No way. Sales professionals don't learn the same way other people do. Time restraints, increased mobility, and changing sales models require a new solution. Unfortunately, many companies aren't even offering an old one. ASTD estimates that only 30 percent of U.S. companies provide sales training, despite a marked increase in

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Sometimes, it's not a matter of delivering the perfect sales training solution but just delivering a solution. Start the process rolling and refine as you go along. For Cisco and Microsoft, waiting for perfection means losing a step on their competitors. The markets those two companies serve demand constant innovation and solutions, placing tremendous demands on the people who sell their products.

Here's a look at two tech giants' ever-evolving approaches to sales training.

### Cisco's just-in-time delivery

If you think that most leading companies are up to snuff on sales training, think again. Even ones generally recognized as e-learning leaders measure their sales training solutions in months, or at most a couple of years. Case in point: Cisco Systems. Diane Bauer, senior manager of e-learning marketing, headed up phase 1 of Cisco's global e-learning platform for sales training, which launched at the beginning of fiscal year 2000.

Cisco used to focus on instructor-led, classroom-based training, but Bauer notes that the model outlived its usefulness. The problem was too few classes revolved around products that had become obsolete. "We were at a clip of acquiring a new company about every three weeks," she says, "but we were still in a mode in which it would take up to six months to roll out a new course."

The salesforce, led by the systems engineering team, produced a platform designed to counter the lag in delivery of information to the field. To be successful, account managers felt training should fulfill these criteria:

- global accessibility to every person in the systems engineering force. "Whether that meant to a hotel in Detroit or a boat dock in Vietnam, access was an issue," Bauer says.
- affordability. It was time to move away from the butts-in-seats model.
- accountability. Develop a model that reports program usage and satisfaction.
- modularity. Chunk information and give salespeople access to what they want when they want it.

productivity as a result of selling skills-related training. But to many experts, 30 percent is optimistic.

“Thirty percent seems incredibly high to me,” says Sam Parker, co-founder of JustSell.com. “And most training deemed sales training is nothing more than delivering product knowledge. It’s not teaching the skills to move to closure.” Out of a US\$57.9 billion corporate training industry, only 14 percent or US\$8.1 billion is spent on sales training, according to JustSell.com’s research. Most salespeople are still learning at the School of Hard Knocks.

### The simplest solution

Where there’s a lack of sales training, there’s a sales rep who’s taking a beating. But that has always been the case in this field. High turnover is expected, though the rules of the game are changing. Thirty years ago, a company could count on the fact that the people who survived the first two years would often go on to finish their careers with the same company. But talented sales professionals no longer make a career out of selling for one company all their lives. Competition is fierce. Unless companies plan to rely on an ever-inexperienced salesforce, they must take action.

So, how do you encourage salespeople to stay or perform to maximum potential while they’re there? Unfortunately, companies with high turnover often overlook the simplest solution: training.

“Well, I think there are two problems. One, management says if it can’t get 20 years of ROI out of them, then why should it bother to train them. The companies cut back because they feel like they’re training someone else’s salespeople,” says Waterhouse. “But experience says the opposite. Organizations that do a better job of training their people tend to have lower turnover. Studies show that training, in fact, breeds commitment to an organization. Companies need to be aware that sales training is worth doing.”

Waterhouse also points out that while you might not be able to count on people devoting 20 years of their careers selling for your company, they’re still drawing a paycheck today. “Do you want that paycheck to result in a minimum return or a maximum return?” he asks.

Another approach to dealing with high turnover is by rethinking the way you train and when you train. Companies plagued by high turnover still insist on training quarterly or less, which often leaves new salespeople going for months without formal

training. Some people may be born to sell, but many can learn the skills to be excellent salespeople if properly trained. Personalized training that offers professional development encourages people to stay with a company and serve the clients who have grown to trust and depend on them for products and solutions. Offering training in a variety of delivery modes will help ensure that salespeople use it.

### Enter e-learning

E-learning seems likely to increase corporate sales training, but many sales divisions are reluctant to replace annual gatherings where training traditionally takes place. Salespeople tend to be gregarious and look forward to these meetings. Not to spoil the fun, but some companies have found the switch to e-learning a financial necessity.

“We used to have meetings quarterly, where we would bring our entire field in for product updates and required courses,” says Peggy Maddox, senior manager of learning tools and solutions for San Francisco-based Cisco Systems. “When we started, we had only four products. We now have 40,000 orderable items on the price list. You can’t keep adding a day to the training [every time] you get a new product.” The cost for those quarterly updates ran into millions for travel and lost sales time. “We had no choice but to put the stuff on the Web.” To be sure, it met some resistance.

When Cisco’s business units wanted to continue to promote their products, they started what were called “road shows,” which entailed a group of engineers traveling around the world to various sales offices. “There were 50 business units, and all of them were doing road shows,” says Maddox. “They were going out to different sales offices, but it was the same solution.” Now, even the road show content is on the Web, where it can be accessed via a video-on-demand presentation. Each module has been broken down into 10 half-day courses, allowing account managers to take them as needed.

InSync’s Hofmann is optimistic that e-learning will eventually abate salespeople’s fears of losing valuable selling time and the networking opportunities of annual sales meetings. Her company recently partnered with Mentergy to create a sales training “Webinar” based on a synchronous learning approach. “Synchronous training minimizes time out of the field and gets training out that

might not have gotten there in the first place," says Hofmann. "And if participants can take 45 minutes online for a live seminar, for instance, they no longer have to make the choice to go to training or go out and sell."

For a complete solution to corporate sales training, most companies find e-learning lacking. "The problem with e-learning is that people are using it as a frontline training tool, and it's not a good frontline training tool. It's a wonderful backline or secondary training tool," says Waterhouse. "E-learning is a wonderful reminder."

### Wireless is the way

If e-learning is a good reminder, then wireless delivery is a smack upside the head. Wireless just may be the perfect platform to deliver just-in-time training reminders and the handy chunks of product information that sales professionals need while in the field. But developing the content and getting salespeople to use it is a challenge.

Right now, most sales professionals go into the field with little else than a cell phone and a briefcase. Though some companies do provide laptops, it's safe to say such tools aren't ubiquitous. Fortunately, many companies have started to realize that the top producers are wired. With laptops, PDAs, and WAP-enabled cell phones, successful salespeople are eager to access all of the learning tools and sales information their companies have to offer. Leading-edge companies are starting to deliver, albeit slowly.

For example, Monsanto provides Palm handhelds to their entire salesforce, allowing trainers to push email reminders to the field and the sales reps to pull information from Websites such as Avantgo. Consultants from Cisco found as they toured Asia that their salespeople have little interest in rich multimedia, Web-based training but want the information delivered to their PDAs right before they walk into a sales call.

Microsoft is also seeing a proliferation of Pocket-PCs among its salesforce. Says Chris Schuler, "The app is email or scheduling. Outside of that, not much exists." That seems to be the case with most companies, though Schuler's team may be changing that. Instead of creating documents for account managers to download to their PCs, they've created an application that lets users interact on the go with learning objects from the company's Voyager Learning Center.

In another example, KnowledgeNet is creating

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- timely. Cisco's salespeople were often the last ones to know about a new acquisition. Information had to be delivered in a timely fashion.
- relevance. Make information specific and relevant to the job at hand. If the task is to get an appointment with the CEO, an account manager should be able to access that information easily.

But standing in Bauer's way was the issue of getting all of that content out to the edges of the network. "The volume issue was probably the biggest thing for us to address because it meant if we had to pump out modular, timely content, we'd need more people producing it. What was rolled out first was what we called the Field E-learning Connection. The components and functionality were a Web address that could be accessed from anywhere in the world internally and inside the firewall and a job-relevant training road map. Depending on the job or specialization, users could go to the road map and click on links to little modules of timely, relevant, affordable training," says Bauer.

Though the first phase was crude, recalls Bauer, it did create global access to a lot of existing content. Bauer and her team posted white papers, sources, documents, and diagrams and worked them into a flow. Then they wrapped questions and answers around those elements. That marked the end of phase 1.

Peg Maddox took over in phase 2, still facing the problem of delivering timely and accurate information. For nine months, subject matter experts and writers cleaned up the content, and a virtual team structure involved with updating information quarterly was created. It wasn't until months later when user comments found their way to the site's creators that Maddox and Bauer knew without a doubt there was still more work to do. "We heard it explicitly," says Bauer. "They said, 'This stuff is boring.'"

Although systems engineers took time to read the white papers, account managers had two complaints: The material was too technical, and they wanted infor-

impressive multimedia-rich applications, complete with MP3 audio and flash animation for the mobile platform.

But the bottom line is use and retention. “It’s not what you know that counts,” says Waterhouse. “It’s what you can remember, especially in sales. Salespeople have to be constantly loading their brains with facts and ideas and be able to pull up information in a hurry. E-learning or a one-day live event isn’t enough. But combined with some kind of mobile delivery, [training] can be.”

### Sales training gets emotional

Moline, Illinois, isn’t the easiest place to get to, but John Deere sales training manager Tony Loyd hopes the company’s new sales representatives never stop

room-based course called Fundamentals of Product, which requires new sales reps to make the trip to headquarters in Moline. The solution integrated a Saba LMS and a blended approach. The five-day course was cut to two, with product fundamentals formatted into reusable learning objects and integrated into a new Web-based training program.

So why not put the entire course online? Though the cost savings was tempting—placing product training online would level the playing field in cost and quality of training for the various-sized dealerships—Deere thinks sales training should be classroom-based. Then there were the emotional factors to consider. Doing away with training at Moline would deprive new salespeople of the experience of seeing a town awash in John Deere green, observing

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John Deere, known for its big green tractors, is a good example of a global company facing the difficulties of training a diverse salesforce, managing an enormous amount of product information, and maintaining a culture that reaps intense loyalty from its mom-and-pop dealers and publicly traded distributors alike.

Although the company had the foresight to offer a wealth of product information via various Web-based dealer portals, word from the field wasn’t encouraging. “The dealer portals gave salespeople access to mountains of information, but they were drowning in info and starving for knowledge,” says Loyd. It was time to rethink Deere’s approach.

Deere chose Logic Bay to rework its product information delivery and traditional five-day, class-

room-based course called Fundamentals of Product, which requires new sales reps to make the trip to headquarters in Moline. The solution integrated a Saba LMS and a blended approach. The five-day course was cut to two, with product fundamentals formatted into reusable learning objects and integrated into a new Web-based training program.

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the products rolling off of the assembly line, and, most important, talking to the men and women who have spent their careers building the machines the salespeople sell.

“When salespeople tour those factories, the workers walk off the assembly line and come over and ask, ‘What kind of questions can I answer for you? That’s my tractor going down the line right there. I’m building that,’” says Loyd. “A huge pride of workmanship comes forth. Salespeople walk away saying, ‘Holy smoke, these people love this stuff.’ We don’t want to lose that impact.”

An emotional experience. Training. A little e-learning. Now that’s a formula for success. TD

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mation they could learn quickly and then download to create presentations.

The Cisco team came up with a four-tiered approach to meet the account managers' needs:

1. Provide a structured online learning database.
2. Develop an account-manager-specific learning environment using content from the system engineer side embedded in sales scenarios.
3. Provide content and learning objects from the database in a magazine format.
4. Create an audio talk show with Cisco experts.

"The content ripped for that radio show is the same as for other media. There's a lot of reuse of the objects so that we get a nice ROI, and it's very consistent across the various media," says Bauer. "Every module is structured in the same sequence: the product, the features, the benefits, what the competition's doing, how you sell the business drivers, how you sell the financial drivers, and how you sell the IT drivers."

"It's a total kit for doing their jobs," Maddox adds. "It's learning on demand."

In future generations of the e-learning platform, the Cisco team plans to capture content and comments from expert account managers. But for now, the focus is on delivering relevant content in a modular format. There's clearly a demand. The Website now has more than 20,000 unique logins companywide even though there are only 10,000 people in the field.

"We talk about it as a consortium of information, communication, education, and training," says Maddox. "We used to argue about whether a white paper with an assessment at the end was actually training. We don't argue about that anymore. We just get the content out to people when they need it and how they need it."

## Training readiness at Microsoft

Cisco chose to focus on delivering relevant content to its salesforce, but for Microsoft it's a matter of readiness. Schuler explains: "The approach that I took wasn't to create a training group to ensure that we train these people to be successful. I purposely don't use the word *training*, preferring to use the word *readiness* to quantify it better. Because driving readiness is about being ready to sell in the enterprise.... It's about giving salespeople clarity within their roles, giving them the tools to be successful, and ensuring that they can do the jobs set out for them."

It's an important distinction considering the

changing sales philosophy at Microsoft. The company is making a concerted effort to move beyond "being a desktop company" to selling servers and business solutions. It's a daunting training task, at best, when you consider that Microsoft has more than 4,500 account managers with 120 subsidiaries worldwide. "That has been a big change," says Schuler. "The shift from desktop to server isn't just a product thing; it's moving from transactional to relationship selling."

Microsoft's salesforce, once used to selling software licensing, is now being asked to sell solutions at a much higher level within their clients' companies. Many salespeople are having to polish their skills. "To go from talking to a CIO to the CFO or CEO is a huge challenge," says Schuler. "The systems and processes of tracking and managing a longer sales cycle, a more complex sales cycle, [are more involved]. It's not just a product you're talking about, it's solutions—which involve partners, technology, and services combined. The complexity puts a lot of stress on systems processes and the skills necessary to be successful in sales jobs. But that's the bar. Here's the challenge: This is going to be the future of Microsoft's salesforce and how we sell and where we get our revenue."

Once Microsoft made the fundamental shift in what it sells and how it sells, it was up to Schuler and his team to find a solution. It was decided that performance would be driven within the salesforce and that its readiness would be Microsoft's competitive advantage. Schuler began by building skills and competency profiles for each of the roles within the sales field. He wanted to know the business challenges, time demands, and knowledge requirements for each position. The results yielded a detailed profile of Microsoft's salesforce.

The challenge was to create and sustain a state of readiness around a core strategy of assessment. After the profiles were set and a content source created, Schuler and his team built a competency assessment tool that profiles each salesperson, provides a skills profile, and creates a targeted learning plan. "Our main goal is about the individual," says Schuler. "We want to provide each salesperson with the tools he or she needs to develop. Because if you're not successful as an individual, you're not successful as a group."

Not surprisingly, management wanted to see the metrics. But Schuler focused on sales management engagement, traveling to each region to train sales

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managers on how to use the assessment and to educate them on the roles they'd fill. "We don't allow managers to see individual assessment data because the behavior we'd see is that people wouldn't be 100 percent effective if they thought their managers were going to scrutinize the results."

Microsoft's system lets salespeople and managers print out a report of their own assessments before managers assess each of their staff independently. Salespeople can then print another report detailing any discrepancies between their own report and their manager's and use that as a springboard for discussion. "The readiness team wanted to ensure account reps that their jobs weren't in jeopardy and the process was truly for them. The next step was to build classroom and e-learning content programs," says Schuler.

July 1, 2001, marked the culmination of the sales readiness team's earlier efforts in assessing Microsoft's salesforce. In partnership with Click2learn, Microsoft launched the Voyager Learning Center, a dedicated sales training center that incorporates existing course content with customized content from Click2learn. The center's goal is to increase performance and provide the sales skills required to work successfully using

Microsoft's new, complex sales model.

Schuler gives an example of how the center's new e-learning solutions are changing the way the salesforce does business: "A challenge is getting customer face time. If account managers have to spend days on end to get the right information to sell the new release of *Office* or have to sit for several days in a classroom to learn the one day of content they really needed to know, that all adds up. [The technology developed in cooperation with Click2learn] gives salespeople the ability to make learning time more efficient and often more effective. A sales rep may need only a higher-level view, a higher cut of content. If a course is three days long, he or she might have to go through three days of content to get the fraction that he or she needs." The center lets users take an assessment, determine the content they need to cover within the course, and potentially save days of classroom time.

"All of that, combined with the investment in readiness and the quality of the salesforce, is part of our overall value proposition. That is Microsoft," says Schuler. "It's not a bunch of code; it's a bunch of people who are going to drive the relationships and products. Driving their readiness is really what success is."

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