By Darin E. Hartley

Mitch Bardwell, director of the sales training division in the Imaging Systems Group of Canon USA, faced a conundrum. He had 41 employees in the training division but needed to train even more than the usual 5000 to 6000 sales staff per year. He couldn't seem to scale the learning fast enough to meet Canon's growth. Bardwell knew that throwing more bodies at the problem wasn't going to meet the voracious training demand; he needed to gain efficiencies at a level that adding more instructors couldn't address effectively.

Over the past five years, training demand at Canon has changed dramatically since its products took a radical evolution. For years, Canon copiers were stand-alone systems, which required less formal training for the salespeople to support. With the advent of digital networked systems, Canon's product line became immediately and exponentially more complex.

Says Bardwell, "We went from selling tennis shoes to space shuttles." At one point, the training organization trained more than 6250 salespeople in a year, across more than 14 sales training channels and further complicating the company's learning need.

# What to do when instructors can't be copied
# Canon Sales

Seated: Mitch Bardwell, director of
sales training division, Imaging
Systems Group

Group, back row;
Russ Wetherington,
curriculum development specialist,
Project Development Department

Paul Balsamo,
curriculum development specialist,
Projects Development Department

Front row;
Adrienne Saur,
curriculum development specialist,
Project Development Department

Carmen Meyer
sales training administrator,
Administration Department

# Training

Bardwell's team is responsible for directing all sales training efforts for the Imaging Systems Group, including individual product divisions and dealer channels, to provide the sales and marketing techniques needed to keep salespeople competitive and competent in the marketplace. He monitors the division and supervises operational and business matters, with each department manager reporting to him. Bardwell also authorizes the development, release, distribution, and delivery of all Canon ISG sales training courseware. The five departments he oversees follow.

**Administration** is responsible for records to satisfy fiscal and operational requirements. The primary functions are budget and procurement, learning management systems, and national and international scheduling and logistics.

**Strategic planning** is responsible for long-term planning, performance improvement, and industry business intelligence. The primary functions are knowledge management, courseware marketing, and industry affiliations.

**Project development** is responsible for creating and developing Canon ISG sales training—instructor-facilitated and self-study courseware. The primary functions are project planning, courseware asset management, and courseware master production.

**Distribution** is responsible for taking all ISG sales training courseware from development to delivery. The primary functions are discipline management and courseware licensing, distribution, and authorization. As the interface between courseware development and delivery, this department handles self-study courseware distribution, as well as the preparation of instructors who facilitate the courseware. This department monitors for quality assurance in new courseware and plans for maintenance of courseware in delivery.

**Delivery** is responsible for ISG sales training field operations throughout Canon Americas. The primary

## Canon U.S.A.

Canon is an industry leader in professional and consumer imaging solutions. Through its parent company Canon Inc. (NYSE: CAJ), it is a top patent-holder of imaging technologies. The company's comprehensive product line includes networked multifunction devices; digital and analog copiers (color and black-and-white); printers, scanners, image-filing systems, and facsimile machines; camcorders, cameras, and lenses; and semiconductor, broadcast, and medical equipment. Canon employs about 10,000 people throughout North, Central, and South America and the Caribbean.

functions are field marketing, field scheduling and logistics, and instructor development. As the primary delivery channel, this department schedules events and brings all of the required resources together to provide a high-quality learning experience. Delivery promotes and markets the programs, develops expert facilitators, and makes all of the necessary arrangements for facilities and equipment, while keeping critical records of events and performance.
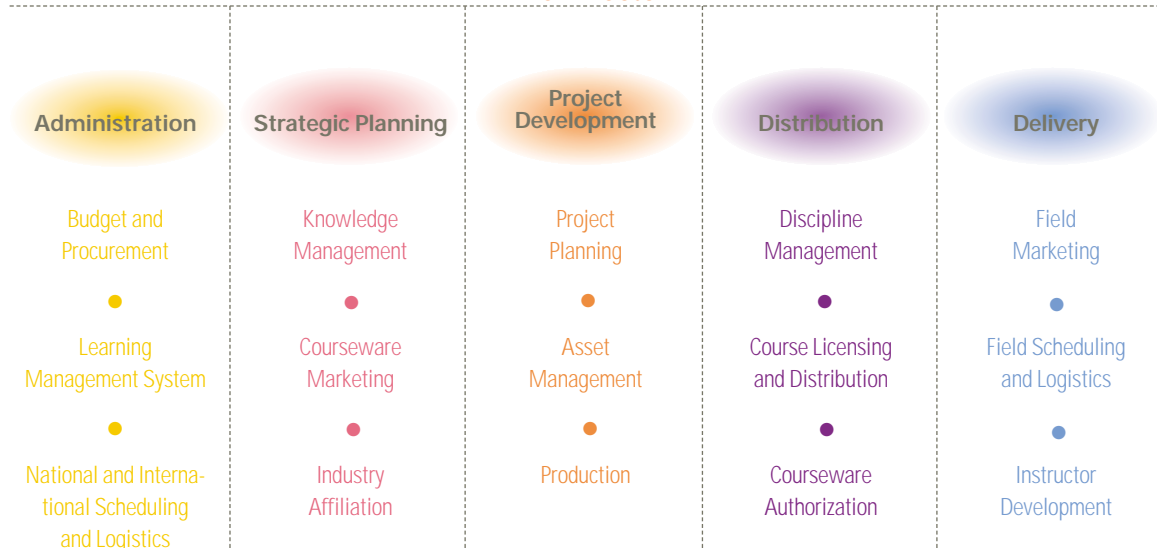
The current sales training division has been around for about 15 years. The primary focus of learning when the division was founded was sales skills for the dealer salesforce. At that time, Canon invested in the trademarked SPIN (Situation, Problem, Implication, Need) selling, which was also adopted by other large *Fortune* 100 companies. Most overseas competitors in that market space didn't train their salesforces in SPIN-based programs, which Canon believes gave it a competitive advantage. Dealer managers also received training in the SPIN programs, which were used holistically inside Canon's dealer channel. That is, there was ongoing support, practice, and reinforcement of the skills and knowledge gained in the classroom sessions. The sales training division grew from seven to 40 people over three years.

As valuable as the sales training program was, there were some issues and limitations. The biggest issue: the long waiting list for classes for salespeople in the field. It could be several months before participants could attend the courses they needed. Because of that delay, it was difficult to achieve reinforcement and learning support. In addition, Canon was footing the bill to train its entire dealer network. This investment in learning set Canon apart from other manufacturers, and the company decided to continue to expand the training division with additional human capital.

# Canon Know How™

## The Director

| Administration | Strategic Planning | Project Development | Distribution | Delivery |
|---|---|---|---|---|
| Budget and Procurement | Knowledge Management | Project Planning | Discipline Management | Field Marketing |
| Learning Management System | Courseware Marketing | Asset Management | Course Licensing and Distribution | Field Scheduling and Logistics |
| National and International Scheduling and Logistics | Industry Affiliation | Production | Courseware Authorization | Instructor Development |

## Checking out e-solutions

Bardwell was in a different situation than many of his training peers: Demand was evident, and the business need was proven. So, it wasn't hard to identify new and improved ways to satiate the learning demand. In fact, Canon's leaders wanted to leverage technology across the company in as many ways as possible. Consequently, Bardwell had plenty of management support as he started research on viable learning technologies and systems.

The Canon sales training team and other recruited staff inside of Canon did due diligence on e-business and e-learning companies and activities. They peeled back and analyzed successful—and unsuccessful—e-ventures. The team—made up of employees from human resources, IT, service training, and sales training—spent a year researching the market space to identify potential solutions. It became evident that a fulfillment-centric strategy would be more effective for Canon than a transactional-centric strategy.

A transactional-centric strategy focuses on high-activity, low-bandwidth initiatives and requires a certain infrastructure to support it, which many companies underestimate. A fulfillment-centric strategy has lower activity but requires higher bandwidth. That is, learners would demand more than a transactional-centric strategy could deliver. Transactional-centric operations are effective in small, automated transactions; fulfillment-centric operations

focus on the experience of customers in a holistic way.

Based on its findings, Bardwell's team decided to focus on a fulfillment-centric strategy and started looking at hardware and software suppliers that could meet Canon's needs. Their strategy was documented formerly and approved by Canon executives. Bardwell and his team soon realized that effective implementation of the strategy would require support from more than one provider. That would be one of the more challenging aspects of the implementation because some vendors are reluctant to work with others.

A learning management system was needed. Bardwell's team met with numerous LMS providers over the course of several months to determine the best fit for Canon. Says Bardwell, "Our team saw more demos than anyone would care to see." The final decision was Intellinex, particularly because of its LEAP (Learning Environment to Accelerate Performance) system. Canon had a great need for an integrator of e-learning solutions and also some development support, and Intellinex could provide both. Many LMSs offer similar services and functionality, so the decision-maker was the support, flexibility, and backing of the parent company, Ernst & Young.

## Goals and challenges

Canon's goals regarding content were threefold:
1. It wanted to analyze its instructor-led training to determine which courses best met the criteria for blended

Examples of two Web-based modules that incorporate Learning Agents: Walter in Color Principles, an introduction to color theory, and Johnny in the CLC Full Line

learning. Before taking a blended approach, Canon's typical classroom sessions lasted one to two days, and a good part of that time was spent getting attendees to the same baseline level of knowledge. The intent of the blended approach was to get salespeople to the same knowledge baseline *before* coming to class so that the same one- to two-day course would yield higher learning objectives and improved competence in the field.

2. Canon wanted to increase the number of training topics and maximize the delivery capacity usually restricted in classroom-only instruction.

3. Canon wanted to extend the reach of its training (an inherent strength of the Web).

Two challenges for the team were that about two-thirds of the audience were non-Canon employees and that analyzing all potential computer configurations would be next to impossible. The team knew that most participants would access the training through their portable computers using a dial-up modem, which led the team to a design standard connection speed of 28.8 kbps. That was a potential hurdle not only for the team, but also for prospective providers.

The restricted download time allowed was a major limitation. Bardwell considered a 30-second download for a 15-second animation unacceptable. He rationalized that because salespeople are on the move and can be impatient, they need to be able to get to information quickly. Without speed as a key design factor, this first time use of e-learning might be the last

for many salespeople. Generally when people have a bad experience with e-learning the first time, it's hard to get them to try it again. Bardwell and his team were concerned about dropout rates and kept that concern at the forefront of development.

The focus on download speed led to a technology challenge and an instructional design challenge. The team believed that if it could address both challenges, it would have a successful e-learning environment for the intended audience. Bardwell charged his team and Intellinex to do the best possible instructional design through the use of stories, metaphors, and self-discovery—all while combining the technology solution of three different vendors.

The next major challenge was the technology. Canon discovered a provider with an excellent streaming technology that allowed voice-over IP with an integrated Learning Agent at 28.8 kbps. The development team optimized the graphics and Flash files by using vector flash files versus rastered files and limiting them to 40k. The team was able to create a robust learning experience with voice, animation, and self-discovery exercises at 28.8 kbps.

Canon also wanted learners to be able to view demonstrations on video as well as on previously released multimedia CDs. Canon found another vendor that allowed for large files to be downloaded in the background, using the available bandwidth, and users could still have access to email and the Internet. It
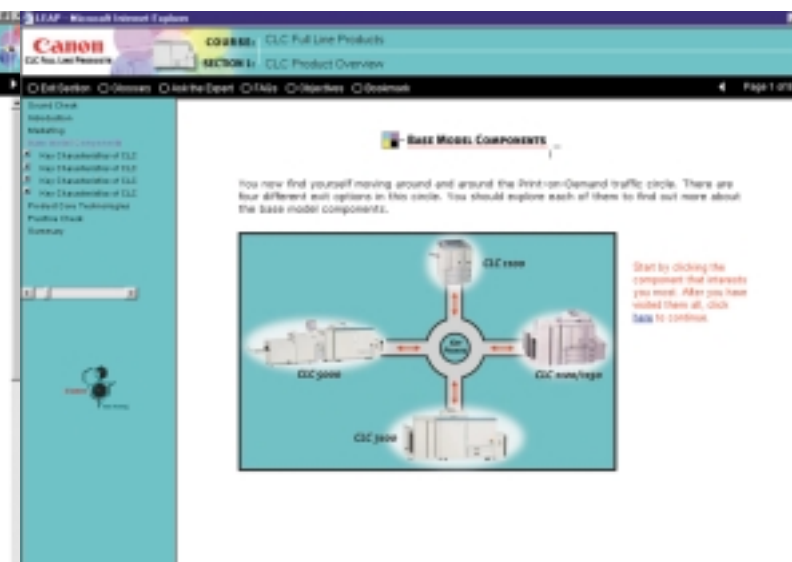
course, which is training on the Graphics Systems digital color copier product line.

worked. Because large files, such as training videos and CDs, aren't part of a Web-based learning experience, those additional learning tools can be sent separately to users' computers. When users select an item, they're told that the download is about to start and that they'll be notified when it's ready. That enables learners to view full-screen video or previously released training CDs at their convenience. That technology combination created a robust low-bandwidth learning environment.

## An organic approach

Canon's plan forward includes meeting with each of the six channels or business units it supports to create a customized launch strategy based on the channels' business objectives and to help ensure a positive implementation experience. The executives in each channel are participating in the training first, which will help ensure more successful change management. As of this writing, one of the six channel partners is going through implementation; launch strategies are being created for the other five. Some are enhancing their existing infrastructures to help ensure a successful implementation. Canon plans to have all six channels using the new learning system soon.

Regarding how much training will be on the Web versus instructor-led, the plan is to have an organic approach and for the salesforce and its leadership to help establish equilibrium through usage. Blend is key.

Bardwell offers these lessons for people considering similar projects:

● Put on your learning hat, and try to learn as much about e-learning as you can by analyzing successful e-learning projects.
● If your organization or team isn't technologically astute, hire full-time or contract support.
● Insist that the suppliers you choose work together to support your business and learning goals.
● Don't underestimate the need for formal requirements documentation.
● Don't forget to sell to upper management the need for functional requirements.
● Allot ample time to build and document the functional requirements.
● Keep the functional requirements in mind when reviewing other potential solutions and requirements.
● Leverage cross-functional expertise within your company.

Bardwell and his team took a methodical and thoughtful approach to the learning issues they faced and leveraged their approach with management support to identify a learning strategy that was on target. They used technology and a group of cooperative vendors to create the solution and help make the salesforce more effective. **TD**

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