

## **Needs Assessment for a Fast Growing Global Training and Consulting Organization**

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*Tales from the Field, a monthly column, consists of reports of evidence-based performance improvement practice and advice, presented by graduate students, alumni, and faculty of Boise State University's Instructional and Performance Technology department.*

### **Growing Pains**

The client organization is a global training and consulting company that currently hires between 10 and 30 new salespeople each year, but plans to hire up to 350 salespeople in the next three years. While completion of the current sales training model is somewhat predictive of a salesperson's long-term success with the company, data indicates that it is not predictive of first year success. The client organization commissioned this needs assessment in an effort to identify a scalable sales training model that will help ensure first year revenues of at least \$300,000 per new salesperson. This needs assessment was accomplished by a team of four members in IPT529 Needs Assessment class, under Dr. Don Winiecki.

### **What the Organization Wanted**

The goal of this assessment was to answer the following questions:

1. What training and/or non-training interventions are needed to close any knowledge and skill gaps that may exist with new salespeople?
2. What training and/or non-training interventions are needed to facilitate first year salesperson performance of at least \$300,000?
3. What system of training and non-training supports will facilitate the initial training and first year ramp-up for 350 salespeople in the next three years?

### **The Process**

Salespeople at the client organization are hired with some to no sales experience. As a consequence, the team began with the idea that a knowledge and skill oriented assessment was the most appropriate method. The team reviewed existing sales performance data and observed sales training. In addition, the team conducted interviews with company executives, the sales training project manager, internal experts, sales mentors/trainers, and salespeople with varying amounts of experience in the company. Following analysis of these data, the team designed and deployed an electronic survey that was completed by the newly-hired and recently-trained salespeople. This enabled the team to identify the range of variables that affected new sales staff and to prioritize them according to their importance for the organization. Finally, the team benchmarked sales training modalities and initiatives in other organizations to help identify key knowledge, skill, performance, and scalability factors in the industry.

### **Data Gathering**

The team relied on open-ended exploratory interviews with stakeholders in administration and

sales, a review of published literature, and a review of archival sales data in the organization to determine the most appropriate needs assessment process.

A team member then observed sales training to document key knowledge, skill and performance elements, rated each session according to interactivity (a key element of sales training as identified in the literature), and gathered live feedback from participants as relevant to the goal of the project. While on site, the team member also conducted semi-structured interviews with company executives and internal experts responsible for components of the sales training. All interview questions were developed based upon prior data collection.

Subsequent semi-structured interviews with high- and low-performing area directors and salespeople, expanded literature and archival reviews, and a survey provided additional data. These data helped the team obtain a holistic perspective of the organization's sales training problem and identify potential next-steps that included a knowledge and skills assessment (KSA). The team selected a KSA process based on patterns identified in the initial data collected. Support for this decision came from Gupta, Sleezer and Russ-Eft (2007) who recommended use of a KSA "when existing training programs must be revised or updated" and "when organizations experience rapid growth" (p. 79).

As data were collected, the team began the data coding process to facilitate an organized perspective that could be used to both guide the project, and identify and support the team's study results and conclusions. Then the team used the coded documents to facilitate subsequent analysis and triangulation across the data collected in order to specify how successful salespeople operated and what helped them succeed in their first year.

## Findings

In response to what the team learned along the way, the team made several modifications to the needs assessment plan. The company's initial concern was sales training scalability; however, based on the data collected in the initial interviews and observation of sales training, the team expanded the focus to include knowledge/skill and performance gaps, and causal (contributing) factors.

The project team found a knowledge/skill gap in salespeople's inability to intuit where to find additional training and support after training and while in the field. Collected data revealed that experienced and exemplary salespeople know where to go within the client company to tap into the resources that are officially and unofficially available to them. Collected comments reflected that low performers did not have this skill and instead focused only on their local practice. For example, a low performing salesperson said during the interview, "do what works, I guess."

Related literature emphasized the importance of mentoring after training for salespersons (Hofman & Miner, 2008; Lambert, 2009; Lambert, 2010; Leslie & Holloway, 2006). However, the project team also found that most area directors failed to follow up and provide mentoring to salespeople. Collected data pointed to the lack of a set standard at the sales management level on how to mentor and train salespeople outside of formal sales training. This performance gap among area directors created a negative environmental factor for salespeople—one of several contributing factors found by the project team. Other factors found were:

- The initial sales training is overwhelming, difficult to implement, and, in sections, irrelevant to salespeople's role, as evidenced by the salespeople's perceptions. This led

to decreases in confidence for trainees and skepticism over the organization's support for their work, both of which had negative influence on employee motivation.

- The company's current sales certification process does not follow a standard structure. This led to inconsistencies in what sales staff knew and could do during their first year of employment.
- Some of the steps in the sales certification process lack clear objectives, time of completion, measures for knowledge and skills learned, and accountability for completing all the steps in the first year. This produced inconsistent incentives for new sales staff to complete the process and implement it in their first year of employment.
- The current training and sales certification programs are site based and require trainees to travel to attend training. This increases costs and limits the number of individuals who can be trained per year.

In summary, data supported the initial hypothesis that the current sales training structure and accountability/incentives plan would not support the company's hiring and sales performance goals.

### **Conclusions and Recommendations**

Based on these findings, the team recommended that the company implement the following:

- Redesign training to take advantage of verified successful elements of the training and support system, and design additional training and support using the same principles exhibited by these successful elements;
- Create a formal mentoring program to guide area directors in mentoring the new salespeople through the certification process;
- Modify existing sales training to eliminate or improve less useful components. Interventions should implement a standard structure consistent with successful elements identified in existing training. These include incorporating clear objectives, timelines, measures, and accountability, as identified in our analyses.
- Develop evaluation and feedback systems for initial and ongoing training and mentoring programs.

Additionally, based on literature detailing large scale training interventions, the team recommended that the organization develop online instruction that would allow components of the training, sales certification program and mentoring program to be offered asynchronously to widely scattered sales personnel.

Based on the systemic data collection, data triangulation, analysis, and supporting literature, the team believes these changes will close knowledge/skill and performance gaps that exist with new salespeople and area directors, and eliminate factors contributing to undesired sales performance. The project team estimated that these changes would help facilitate first year salesperson performance of at least \$300,000, and support the initial training and first year ramp of 350 salespeople in the next three years.

## References

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