

An Evaluation of Presentation Skills Instruction

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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.

Company Background

Pepin Distributing Company (PDC) is the Tampa Bay area's largest total beverage distributor. Incorporated in 1963, the company sells and markets a diverse portfolio of beverage products, including beer, bottled water, carbonated and energy drinks, liquor, and wine. PDC's account managers (AMs) provide the direct interface with customers and are the primary drivers of product sales. AMs actively manage more than 2,000 retail accounts, meeting regularly with retailers to offer choices based on retailers' needs and desires. AM success demands knowledge of PDC's entire product portfolio and the ability to professionally present the features, benefits, and supporting sales data for all PDC products in order to influence retailers' buying decisions.

Evaluation Questions

In February 2011, a Regional Training Manager (RTM) conducted a previously designed training program, *Professional Presentation Skills*, for all AMs at the request of PDC's top management. The program's main goal was to provide AMs with the presentation skills needed to more effectively drive sales. To determine the effectiveness of the *Professional Presentation Skills* program, in the fall of 2011, a team of three graduate students at Boise State University partnered with the client organization and conducted a summative evaluation with the following three questions:

1. Presentation Design: Was the program designed in a way that the trainees could apply what they learned?
2. Job Relevance: Was the program content relevant to the AM's job?
3. Sales Improvement: Has the application of the program content led to increased sales?

Program Logic Model

To illustrate the cause-and-effects by which the program being evaluated met certain needs or produced certain effects, the evaluation team collaborated with the client organization to develop a program logic model (Table 1). This model depicts the resources (inputs) and activities that went into the program development, the outputs, the short-term and long-term outcomes, and the impacts that were intended as a result of the resources and activities.

Table 1. *Professional Presentation Skills Program Logic Model*

Inputs	Activities	Outputs	Outcomes	Impacts
<p>Program sponsorship</p> <p>Management support</p> <p>Budget for facilitator, facility, copies, and incidentals</p> <p>Presentation skills as a subject matter expert (SME)</p> <p>Instructional designer to develop the presentation skills program</p> <p>Skilled facilitator to deliver the training program</p> <p>Local sales data</p> <p>Participation of AMs</p>	<p>Develop a detailed project plan</p> <p>Design the presentation skills training program</p> <p>Design the assessment strategy</p> <p>Design the field observation checklist</p> <p>Produce and distribute the materials</p> <p>Plan for the next generation of the program</p> <p>Analyze local market data to prepare for each sales call</p>	<p>AMs have increased awareness of each retailer's communication style</p> <p>AMs prepare precall execution plans (including the call objective and appropriate sales collateral)</p> <p>AMs demonstrate their ability to apply (number and quality) the four key program elements on each sales call</p> <p>AMs are able to highlight the "point of difference" (maximizing profit margins) during sales presentations</p> <p>AMs execute sales presentations in a professional manner</p>	<p>SHORT-TERM (1 to 3 months)</p> <p>AMs show their ability to adapt to retailer's communication style</p> <p>Increase in higher profit margin brand presentations</p> <p>LONG-TERM (3 months to 1 year)</p> <p>More confident sales force</p> <p>Increase in the number of exclusive contract requests</p> <p>Sales of high-profit margin brands become consistently higher versus previous year's sales</p> <p>Ongoing learning and skill development through best practice sharing at sales meetings</p>	<p>Recognition of PDC sales departments as the region's best (sales and service) in the beverage industry</p> <p>New beverage manufacturers interested in partnership request PDC as their exclusive distributor</p>

Evaluation Methods

At the client's request, this was a goal-based evaluation, assessing if providing AMs with the presentation skills instruction had resulted in intended, desirable outcomes. The evaluation team used Scriven's (2007) *Key Evaluation Checklist* to guide the selection and review of both process and outcome dimensions and the importance of weighting the dimensions: 1. Presentation Design (Somewhat Important), 2. Job Relevance (Important), and 3. Sales Improvement (Very Important). The evaluation team used archival sales data, AM observation checklists, interviews, and web-based surveys to obtain data needed to evaluate the three dimensions of the program. The team incorporated Kirkpatrick's (1979) 4-level evaluation model and Brinkerhoff's (2006) Success Case Method (SCM) into the design of the dimensions and data collection method. Based on the evidence shown in the data, the team assessed the quality of each dimension using a 4-point scale: Poor, Marginal, Good, and Excellent.

Evaluation Results

The process evaluation for the *Professional Presentation Skills* program focused on one dimension of merit, presentation design, and its evaluation question—*Was the program designed in a way that the trainees could apply what they learned?* Executive stakeholders weighted the presentation design dimension as somewhat important. The evaluation team reviewed the curriculum design of the workshop PowerPoint slides and the results of a participant reaction survey (Kirkpatrick Level I) to arrive at a presentation design quality rating of *Good*.

The outcome evaluation for the *Professional Presentation Skills* program focused on two dimensions of merit: job relevance, which is a short-term outcome, and sales improvement, which is a long-term outcome. For the job relevance evaluation question—*Was the program content relevant to the AM's job?*—executive stakeholders weighted the job relevance dimension as important. The evaluation team reviewed the results of a participant reaction survey (Kirkpatrick Level I), data from recent AM Observation Forms (Kirkpatrick Level 3), and transcripts from SCM interviews with high- and low-performing AMs to arrive at a job relevance quality rating of *Good*.

The second outcome evaluation dimension of merit for the *Professional Presentation Skills* program was sales improvement, which is a long-term outcome. For the evaluation question for sales improvement—*Has the application of the program content led to increased sales?*—executive stakeholders weighted the sales improvement dimension as very important. The evaluation team reviewed extant sales data on current sales trends and market conditions and year-over-year sales data. At first, PDC-specific sales data showed negative year-over-year growth for the past 3 years; however, average AM sales since the *Professional Presentation Skills* training were down only 0.2%, compared to 4.4% and 1.8% in the previous 2 years, respectively. The evaluation team also examined individual AM sales data pre- and post-training and applied these data to the rubric (Table 2). A total of 23 AMs had post-training sales of 100% or higher, or excellent, compared to the same time period 1 year ago; 22 AMs had post-training sales of 95% to 99.9%, or good; and only 1 AM had sales of less than 95% compared to last year, yielding a rating of marginal. This distribution supports a sales improvement rating of *Excellent*. However, since

the impact of the *Professional Presentation Skills* training cannot be separated from other variables impacting sales performance, the evaluators decided on a sales improvement dimension rating of *Good* so as not to advance confidence in the relationship between the training and year-over-year sales data.

Table 2. *Sales Data Rubric*

Poor	Marginal	Good	Excellent
Below 90%	90%-94.9%	95%-99.9%	100% or Higher

In consideration of the good rating for each of the three dimensions of presentation design, job relevance, and sales improvement, the evaluation team determined that the overall quality of the *Professional Presentation Skills* training was *Good*. A summary of the dimensions, their rating, and weighting is presented in Table 3.

Table 3. *Professional Presentation Skills Program Dimensions, Rating, and Weighting*

Dimension	Professional Presentation Skills Program Overall Quality: <i>Good</i>				Weighting
Presentation Design			X		Somewhat Important
Job Relevance			X		Important
Sales Improvement			X		Very Important
	<i>Poor</i>	<i>Marginal</i>	<i>Good</i>	<i>Excellent</i>	

Summary

In an effort to meet PDC's organizational goals, the evaluation team recommended that taking meaningful action in certain areas would provide continued job-relevant training content and contribute to incremental sales increases. This evaluation considered the overall design and delivery of the *Professional Presentation Skills* training program as well as AM reactions, interviews, and observations. The evaluation revealed both strengths and opportunities for improvement, as noted in Tables 4 and 5:

Table 4. *Strengths of the Professional Presentation Skills Program*

Strengths	Importance	Reasoning
Clear learning objectives	Low	Learning objectives must be clear so AMs understand the goals of the training
Easy-to-use materials	Low	Materials must be easy-to-use to facilitate AM understanding and subsequent on-the-job application

Relevant examples	Medium	AMs must be able to apply the training content to their jobs
Perceived as important to improved sales performance by most AMs	High	The organization’s primary goal for the <i>Professional Presentation Skills</i> program is to improve sales performance

Table 5. *Opportunities for Improvement of the Professional Presentation Skills Program*

Opportunities for Improvement	Importance	Reasoning
Increased opportunity to participate and discuss during training	Low	PDC management must know that AMs have learned the material
Increased opportunity to practice during and after training	Medium	Learners must have additional practice opportunities to implement and improve upon the skills taught in the training
Address perception issues with AMs who believe presentation skills are not important to AM success	High	The organization’s primary goal for the <i>Professional Presentation Skills</i> program is to improve sales performance. Perception is the AMs’ reality

References

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