TRAINING’S ROLE IN THE IMPLEMENTATION OF STRATEGIC INITIATIVES IN THE SALES ORGANIZATION
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OVERVIEW

A major challenge for many corporations is how to effectively leverage their training organizations for internal learning and development needs. Further, when planning to implement strategic initiatives across internal organizations, the need for understanding and collaboration is magnified. The goal of the following study is to explore and define the role of the training organization when implementing strategic initiatives in the sales organization.

In July 2012, 174 learning leaders across 23 different industries contributed their thoughts on the subject. Seventy-four percent (74%) of learning leaders stated that their internal training organizations are effective at supporting the implementation of strategic initiatives in the sales organization. However, of these respondents, only 26% said that their training organizations were very effective at supporting the implementation of such initiatives.

This study not only examines factors that differentiate very effective organizations from ineffective organizations, but also identifies best practices for:

- Improving the understanding of what’s involved in supporting strategic sales initiatives
- Ensuring the alignment of training initiatives with goals set by sales leadership
- Sustaining the impact of training for the implementation of strategic sales initiatives

KEY FINDINGS

- Twenty-six percent (26%) of learning leaders cited a new value proposition as the implementation requiring the most support.
- Overall, only 26% of learning leaders said their training organizations are very effective at supporting the implementation of strategic initiatives in the sales organization.
- When comparing very effective and ineffective training organizations:
  - Very effective training organizations are twice as likely to purchase customized solutions as ineffective training organizations.
  - Learning leaders from very effective organizations meet with senior sales leadership weekly to discuss the progress of the implementation. Surprisingly, some learning leaders report NEVER meeting with senior sales leadership. This is generally a recipe for failure.
- To better understand what’s involved in supporting a strategic sales initiative, learning leaders need to be provided insight into training needs and a defined sales strategy and training goals.
- A majority of learning leaders said their companies effectively leverage their training organizations by creating a partnership between sales and training and by gauging performance and feedback.
• Conferencing software, short-form content, and surveys and polls are the most commonly used tools and technologies for supporting sales initiatives.

• Mobile learning, gamification, and mentor networks are the most-cited tools and technologies that learning leaders plan to use for supporting sales initiatives.

• To ensure alignment with the goals set by senior sales management, learning leaders reported the following best practices most often:
  
  o Define the sales strategy and training goals and create metrics to measure effectiveness.
  
  o Agree on the roles responsibilities and actions of sales leadership to support the change effort.
  
  o Facilitate a joint planning session to ensure the linkage between the strategic initiative and the training activity is understood.

• Learning leaders identified the following best practices for sustaining the impact of training during and after implementation:
  
  o Reinforcement and follow-up training using a variety of methods, citing coaching and sales management training most often.
  
  o Feedback forms after the training.
  
  o Assessments or tests before and after training.
PARTICIPANTS’ ROLES IN TRAINING FOR STRATEGIC SALES INITIATIVES

Of learning leaders surveyed, more than 70% participate in designing and developing the training program, diagnosing training needs, and measuring the impact of the training program.

Figure 1

<table>
<thead>
<tr>
<th>Role</th>
<th>Percentage</th>
<th>N=169</th>
</tr>
</thead>
<tbody>
<tr>
<td>Designs and develops the training for the sales team</td>
<td>79.3%</td>
<td></td>
</tr>
<tr>
<td>Diagnoses the specific needs for the sales training</td>
<td>76.3%</td>
<td></td>
</tr>
<tr>
<td>Measures the impact of the training program</td>
<td>72.2%</td>
<td></td>
</tr>
<tr>
<td>Delivers the sales training programs</td>
<td>60.9%</td>
<td></td>
</tr>
<tr>
<td>Sources the training materials or services from a third party</td>
<td>59.8%</td>
<td></td>
</tr>
<tr>
<td>Responsible for administration and logistics (e.g., rooms, instructors, materials) for the sales training</td>
<td>52.7%</td>
<td></td>
</tr>
<tr>
<td>Participates in the development of the sales strategy</td>
<td>43.2%</td>
<td></td>
</tr>
</tbody>
</table>
A majority of learning leaders cited a new value proposition as the implementation requiring the most support. A new vision, strategy, and objectives, and new or redesigned sales processes, were also popular initiatives requiring substantial support from learning leaders.

Figure 2

- New value proposition: 25.9%
- New vision, strategy, and objectives: 21.2%
- New or redesigned sales processes (e.g., call planning, opportunity management, account management): 21.2%
- Sales force expansion, contraction, reorganization, or restructuring: 15.3%
- Major new product launch: 11.8%
- Geographic expansion or territory realignment: 2.9%
- Mergers and acquisitions: 1.7%
LEVELS OF EFFECTIVENESS

Learning leaders were asked how effective their training organizations are at supporting the implementation of strategic initiatives in the sales organization. Overall, 74% of learning leaders surveyed said their training organizations could improve their effectiveness when supporting the implementation of strategic initiatives. Only 26% thought that their organizations were “very effective” at supporting the implementation of strategic sales initiatives, compared with 24% who felt their organizations were completely “ineffective.” (See Figure 3)

The “very effective” and “ineffective” groups are labeled below and are compared throughout the report to distinguish the differences between how each type of organization handles the implementation of training for strategic sales initiatives.

Figure 3
LEVELS OF CUSTOMIZATION

Learning leaders were asked what best describes the types of products and services their companies purchase for sales training, ranging from fully customized solutions to fully generic or off-the-shelf options. Seventy-two percent (72%) of total respondents, as seen in Figure 4, said their organizations purchase products and services that are highly customized to their sales training program(s).

Figure 4

<table>
<thead>
<tr>
<th>Percentage of Respondents, N=172</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some customization combined with off-the-shelf</td>
</tr>
<tr>
<td>Fully customized to our company's needs</td>
</tr>
<tr>
<td>Mostly off-the-shelf with some customization</td>
</tr>
<tr>
<td>Do not purchase and/or develop internally</td>
</tr>
<tr>
<td>Fully generic or off-the-shelf</td>
</tr>
</tbody>
</table>
However, when comparing very effective organizations to ineffective organizations, very effective organizations are *twice as likely* to purchase products and services that are fully customized to their companies’ needs. Please refer to Figure 5 below.

**Figure 5**

![Bar chart showing differences in product and service customizations between very effective and ineffective organizations](chart.png)
FREQUENCY OF INTERACTION WITH SALES LEADERSHIP

Constant communication and collaboration between the training and sales organizations is considered imperative during the implementation of strategic initiatives. However, when learning leaders were asked how often they provide updates to senior leadership regarding the progress of an implementation of a strategic initiative (in the sales organization), monthly and quarterly meetings were the most common.

Not surprisingly, learning leaders from very effective organizations meet with senior sales leadership more often than those from ineffective organizations. In fact, 15% of those from ineffective companies reported never meeting with senior sales leadership. See Figure 6 below.

Figure 6

15% of learning leaders from ineffective companies reported never meeting with senior sales leadership.
TOOLS & TECHNOLOGIES

Learning leaders were asked which sales tools and technologies their companies currently use or plan to use in support of the implementation of strategic initiatives in the sales organization.

Tools & Technologies Companies Currently Use

Conferencing software, short-form content, and surveys and polls are the most commonly used tools and technologies for supporting sales initiatives. The least used are wikis and gamification.

Figure 7

<table>
<thead>
<tr>
<th>Tool Type</th>
<th>Percent of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferencing software (e.g., web/audio)</td>
<td>82.3%</td>
</tr>
<tr>
<td>Short-form content (e.g., job aids, quick reference guides)</td>
<td>80.8%</td>
</tr>
<tr>
<td>Surveys and polls</td>
<td>77.7%</td>
</tr>
<tr>
<td>Quizzes</td>
<td>75.9%</td>
</tr>
<tr>
<td>Short e-learning pieces</td>
<td>69.7%</td>
</tr>
<tr>
<td>Dashboards</td>
<td>64.4%</td>
</tr>
<tr>
<td>Video (e.g., YouTube-like)</td>
<td>56.8%</td>
</tr>
<tr>
<td>Chat/forums</td>
<td>43.3%</td>
</tr>
<tr>
<td>Mentor networks</td>
<td>43.3%</td>
</tr>
<tr>
<td>Social networking software (e.g., Facebook-like)</td>
<td>42.7%</td>
</tr>
<tr>
<td>Performance Support Systems</td>
<td>38.8%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>35.5%</td>
</tr>
<tr>
<td>Blogs and Microblogs</td>
<td>32.6%</td>
</tr>
<tr>
<td>Mobile learning</td>
<td>32.1%</td>
</tr>
<tr>
<td>Wikis</td>
<td>24.3%</td>
</tr>
<tr>
<td>Gamification</td>
<td>12.4%</td>
</tr>
</tbody>
</table>

Percent of Respondents, N=172
Tools & Technologies Companies Plan to Use

When asked which tools & technologies they plan to use to support the implementation of strategic initiatives, learning leaders cited mobile learning, gamification, and mentor networks most often.

Figure 8

Mobile learning and gamification are the only technologies of which planned use exceeds current use.
ENSURING BETTER UNDERSTANDING

Learning leaders were asked to explain what would have helped them better understand what was involved in supporting the implementation of a strategic initiative in the sales organization. Overwhelmingly, learning leaders cited the importance of having knowledge about training needs and a defined sales strategy and training goals.

Figure 9

- Knowledge about training needs (e.g., organizational processes, sales models, needs of sales team, best practices) - 21.0%
- Defined sales strategy and training goals - 18.1%
- Clear and consistent communication before, during, and after the initiative - 11.4%
- Stakeholder involvement - 11.4%
- Leadership/Corporate involvement - 11.4%
- (Early) T&D involvement in the planning process - 8.6%
- Resources to analyze training needs and design training program - 7.6%
- Needs assessment and feedback - 6.7%
- Cooperation and integration among departments - 3.8%

Percentage of Comments, N=105
ENSURING ALIGNMENT WITH GOALS SET BY SALES LEADERSHIP

Along with understanding the training needs of the sales organization, the training organization must develop the sales training around the goals set by sales leadership. Learning leaders were asked to identify which practices they use to ensure the alignment of training initiatives with goals outlined by senior sales management during the implementation of strategic sales initiatives.

Over 70% of learning leaders selected agreeing on the roles and responsibilities of sales leadership and facilitating a joint planning session as the most important practices to ensure alignment. See Figure 10 below.

**Figure 10**

- **Agree on the roles, responsibilities, and actions of sales leadership to support the change effort**: 74.7%
- **Facilitate a joint planning session to ensure the linkage between the strategic initiative and the training activity is understood**: 73.5%
- **Measure and report the effectiveness of the training initiatives during the change in sales strategy**: 67.1%
- **Agree on leading key performance indicators (LKPIs) the training will impact**: 65.3%
- **Develop communication plans for sales leadership to support the change effort**: 64.1%
- **Communicate with the senior sales management during training for a change in sales strategy**: 64.1%
- **Develop and improve the process for effectively training the goals developed by senior sales management**: 60.0%
- **Establish verifiable outcomes to objectively measure each LKPI**: 57.1%
- **Establish performance baselines and goals for each LKPI**: 50.6%

*Percentage of Respondents, N=170*
BEST PRACTICES TO ENSURE ALIGNMENT

Learning leaders were asked to describe a best practice they use to ensure alignment with goals developed by senior sales management for an implementation of a strategic initiative in the sales organization. Learning leaders cited the following best practices for ensuring alignment, in order of most to least-often mentioned:

- **Clarify** the sales organization’s goals and create metrics to measure the impact of training on those goals (38%)
- **Communicate** clearly and consistently with stakeholders throughout the initiative (e.g., meetings, e-mail, etc.) (22%)
- **Involve** the training organization early and encourage collaboration (18%)
- **Secure** leadership support and approval throughout (15%)
- **Ensure** stakeholder buy-in and participation (e.g., customers, salespeople) (7%)

LEVERAGING THE TRAINING ORGANIZATION

Learning leaders were prompted to explain how their companies ensure that they effectively leverage the training organization to support an implementation of a strategic initiative in the sales organization. The responses given reveal that a majority of companies leverage their training organization by creating a partnership between the training and sales organizations (29%) and/or by gauging performance and feedback (27%). However, a shocking 16% of learning leaders said their sales organization doesn’t leverage their training organization effectively, or at all.

Other notable responses from learning leaders explaining how their companies effectively leverage the training organization when implementing strategic sales initiatives include:

- Clear and consistent communication among involved parties
- Leadership/Executive involvement and buy-in
- Ensuring training resources are allocated (e.g., funds, staff)
- Designing and/or developing comprehensive internal training programs

16% of learning leaders said their sales organization doesn’t leverage their training organization.
SUSTAINING THE IMPACT OF TRAINING

Despite identifying what practices are essential for training organizations to better support and implement strategic sales initiatives, they are useless if training is neither measurable nor impactful. Learning leaders were thus asked which practices they used to effectively sustain the impact of training during the implementation of strategic initiatives in the sales organization.

As demonstrated in Figure 11, feedback forms and assessments were the most common practices used to help sustain the impact of training. Contrarily, implementing rewards systems and providing incentives, as well as sales leadership preparation were the least common practices used to sustain the impact of training.

<table>
<thead>
<tr>
<th>Practice</th>
<th>Percentage of Respondents, N=168</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feedback forms after the training</td>
<td>77.4%</td>
</tr>
<tr>
<td>Assessments or tests before and/or after training</td>
<td>67.3%</td>
</tr>
<tr>
<td>Ask their manager</td>
<td>66.1%</td>
</tr>
<tr>
<td>Observation of the salesperson in the workplace</td>
<td>60.7%</td>
</tr>
<tr>
<td>Follow-up learning (e.g., webinars, e-learning, tools)</td>
<td>60.1%</td>
</tr>
<tr>
<td>Sales management coaching</td>
<td>58.3%</td>
</tr>
<tr>
<td>Formal communications from leadership</td>
<td>54.2%</td>
</tr>
<tr>
<td>Mentoring of the salesperson</td>
<td>51.2%</td>
</tr>
<tr>
<td>Dashboards that track progress</td>
<td>50.0%</td>
</tr>
<tr>
<td>Sales leadership preparation</td>
<td>41.7%</td>
</tr>
<tr>
<td>Incentives and rewards</td>
<td>39.3%</td>
</tr>
</tbody>
</table>

Figure 11
BEST PRACTICES FOR SUSTAINING THE IMPACT OF TRAINING

Learning leaders use a variety of practices to sustain the impact of training when implementing strategic sales initiatives. When asked to describe a best practice to effectively sustain the impact of training, learning leaders provided the following responses, in order of most to least mentioned:

- Reinforcement and follow-up training using a variety of methods*
- Continuously assessing performance, feedback, and training needs and improving accountability
- Open and consistent communication among stakeholders (via meetings, e-mails, social, etc.)
- Encouraging continuous collaboration between sales and training organizations and their leadership

Although learning leaders cited coaching, e-learning options and effective sales management training most often as methods for reinforcement and follow-up training, sales preparation is one of the least used practices for sustaining the impact of training (Figure 11).

*When discussing reinforcement and follow-up training methods, learning leaders cited coaching, effective sales management training, and e-learning options most often.

WHAT LEARNING LEADERS HAVE TO SAY

Below are three quotes that represent the majority of comments from learning leaders regarding best practices for sustaining the impact of training:

“Follow-up learning opportunities to expand on initial efforts, along with assessments before and testing afterwards. Allow for refocused training to fill in gaps.”

“Continuity through mentoring and leadership training. Continuously assess performance; we retrain and redirect...if impact is not what we expected.”

“Constant communication to all staff keeping them updated on changes in programs and processes” and “a variety of resources they can access” during and after the initiative.
ADVICE TO SALES LEADERSHIP

In the spirit of facilitating collaboration and communication among the training and sales organizations, learning leaders were asked to give advice to sales leadership on how to more effectively support training organizations during the implementation of a strategic initiative in the sales organization.

An overwhelming majority of learning leaders stated that involving the training organization early and consistently encouraging collaboration among departments were best practices for effectively leveraging the training organization. Learning leaders also gave the following advice to sales leadership:

- Be proactive. Assess training needs early and be knowledgeable about roles and processes.
- Ensure leadership involvement and support.
- Encourage clear and consistent communication among involved parties.
- Use various training methods that will reinforce training goals.
- Establish performance metrics and feedback mechanisms.
- Define a clear sales strategy and training goals.
- Allocate proper resources.

WHAT LEARNING LEADERS HAVE TO SAY

Below are three quotes that summarize the advice that learning leaders have for sales leadership on how to best support the training organization during the implementation of strategic sales initiatives.

“Ensure that training is involved from the very beginning to assist the team in determining what is feasible, timely, and cost effective.”

“Establish partnerships between the sales and training organizations’ leadership. Share strategic objectives. Budget for sales training (development and facilitation).”

“Communication, communication, communication – and clearly defined roles. The training team should be ‘out in the field’ from time to time, shadowing sales associates.”
DEMOGRAPHICS

Industries Represented

Among a total of 174 respondents, 23 industries were represented, with more than one-third (1/3) from the top three industries: Banking/Finance, Technology, and Business Services/Consulting.

Figure 12

- Banking/Finance: 13.2%
- Technology (e.g., computers, software, ISP, etc.): 12.1%
- Business Services/Consulting: 12.1%
- Training & Development: 8.0%
- Insurance: 6.9%
- Healthcare: 5.7%
- Manufacturing, Durable Manufacturing: 4.6%
- Retail: 4.6%
- Telecommunications: 4.6%
- Media/Entertainment: 4.0%
- Education: 2.9%
- Hospitality: 2.9%
- Manufacturing, Non-Durable: 2.3%
- Construction: 2.3%
- Government (e.g., Federal, including Military): 1.7%
- Government (e.g., State, Local): 1.7%
- Oil & Gas: 1.7%
- Transportation: 1.7%
- Medical: 1.7%
- Pharmaceuticals: 1.7%
- Wholesale Distribution: 1.7%
- Other: 1.7%
Company Size

Sixty-three percent (63%) of respondents were from companies with 500 employees or more.

Figure 13

Job Title/Role within the Company

Approximately 56% of respondents hold leadership titles within the training and development space (Vice President or other Executive, Training & Development Director, or Training & Development Manager).

Figure 14
ABOUT RICHARDSON

Richardson helps leaders prepare their organization to execute sales strategies and achieve business objectives. We have the expertise and resources to help you scale your initiative quickly and confidently across your entire sales force and supporting functions. With you, we establish sales best practices, evaluate talent, build capability and consistency through world-class training, and sustain necessary change. We ensure that your solution reflects your unique culture and values, which drives rapid adoption and lasting results.

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