
UNIT 10 TRAINING THE SALES FORCE

Objectives

After reading this unit, you should be able to:

- understand the importance of training for the sales personnel
- learn the training process
- identify the areas in which training for the field sales personnel can be of use
- understand how to conduct each step of training.

Structure

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10.1 INTRODUCTION

If you ask any sales person or a sales manager about how did they learn the selling skills, majority of them will answer, 'by experience'. The statement, however is really useful when we learn the correct things by experience and more importantly when we are able to use the lessons successfully. But what happens when we make mistakes? Next time we don't do the same mistake and we say, "I learned it all the hard way." It is suggested that, as training manager, you should be sure to check what he learnt the hard way.

There are salesmen who have never learnt the art of closing their sales. There are others who have talked too much for all the years they were in selling. In fact, there are still many more, who, never discovered the best way to sell or manage their time.

Experience alone is perhaps never sufficient. We all have to learn from the knowledge and experience of the others. This is where the right training can make a difference.

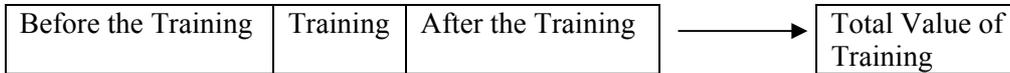
Training can help transform a below-average salesman to an average salesman, or the average salesman to sell higher and the top salesman to reach newer heights.

In a competitive market, sales training can bridge the gap between success and failure. Customers generally evaluate a company's product based on the salesman's performance, confidence or lack of confidence, inability to fully explain the product benefits, etc. When the market is competitive the customer may place the order with salesman who performs better than the other in a sales interview.



10.2 LOGIC OF TRAINING

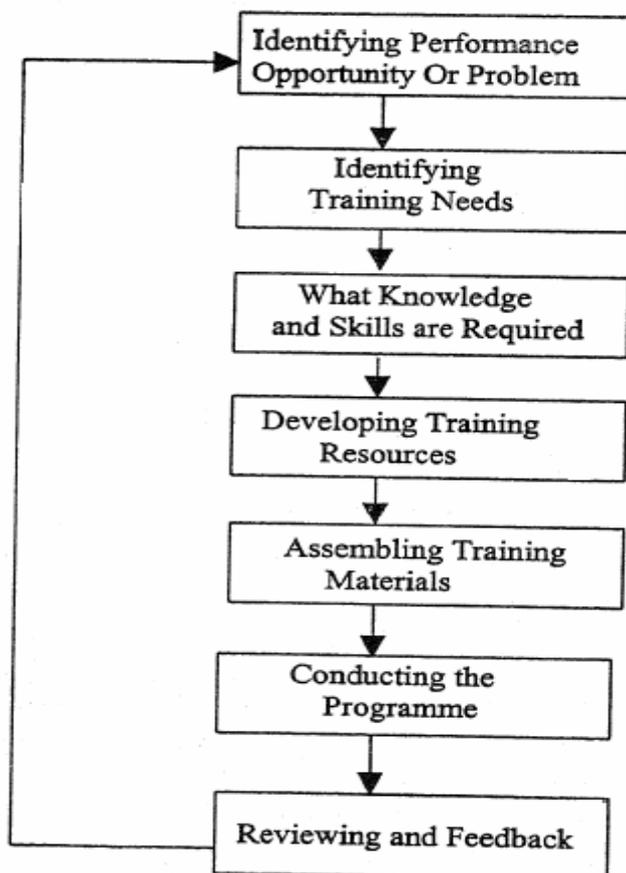
It must be clearly understand that a training programme is just a small portion of the total learning experience of any participant. Before any participant attends a training programme, the trainer must identify specific area of knowledge, skills, or attitude in the participant that needs to be improved. (A detailed account on these points is given in 10.5). After the training programme, it is expected that the participants have gained the required knowledge, skills or attitudinal change.



However, the more important part is when the participant uses this new knowledge, skills and attitude at his work place to get better results, than he was getting prior to training. These results will benefit the organization and will add more value to the organization. Thus to consider the total value of any training, it is important to consider the sequence of training activity in its totality, i.e., before the training, the training event and after the training.

10.3 TRAINING PROCESS

Training can be defined as learning to change the performance of people, doing certain tasks. From this definition we observe that training revolves around helping people to learn so as to improve their performance. The training process can be broken down into four major steps, for easy understanding. These steps are, identifying training need ,designing the programme, conducting the programme, training follow up. Apart from the above distinctive steps, a trainer must have knowledge about adult learning styles, so that the programme can be tailored as per requirements. Diagrammatically, the training process can be represented in the following manner:





10.4 AREAS OF SALES TRAINING

The purpose of a sales training programme is to impart training in the following broad areas mentioned below:

- Company's knowledge - nature of industry to which the organisation is related. The organisational place in its industry and industrial practices
- Product knowledge and applications
- Sales techniques - the selling process, negotiation skills, sales presentation, handling complaints, post sales follow-ups, etc.
- Reporting systems

Depending upon the contents of training programme the training methods or technique are selected. These methods are discussed under item 9.8, in this unit.

10.5 PROCESS OF IDENTIFYING TRAINING NEEDS

A training need can be defined as a gap between the desired level and the actual level of knowledge, skills or performance that can be bridged by training. The starting point for organising and conducting an effective training programme for the salesmen is the careful and precise identification of training needs. Well intentioned, but general sales training may not yield good results. To the salesmen it may not appear to be tailored to their needs, or it failed to take account of the special selling situations they generally face.

Thus it is very important to perceive and identify the individual's training needs and then decide about the objectives and contents of the training programme. The identification the sales training needs is a rational undertaking and it has to be done in proper sequence, which are as follows:

The first step in the identification of the training needs is to define the jobs, to be done, the specific tasks involved and the performance standards required. This involves writing of the jobs description.

Secondly, specifying what knowledge, skills and attitudes are needed to achieve the standards set for the job. Based on the job description, a training needs analysis can be done setting out the knowledge, skills and attitudes. Some examples of such an exercise are given below :

JOB DESCRIPTION/TASK/KNOWLEDGE SKILLS/ATTITUDES ANALYSIS

Job description : Keep Technically and Commercially Up-to-date

Task	Knowledge	Skills	Attitudes
(a) Read Journals	What knowledge and skills are needed as defined by the job and the company.	Ability to : self train, learn, interpret and apply, information and use initiative	Training is not a classroom operation. Good training is self-inspired continuous and accumulative
(b) Attend relevant Meeting and events			
(c) Assess own training needs with manager on a continuous basis			

Job Description : Liase with Companies and Organisations

Task	Knowledge	Skills	Attitudes
(a) Make contact with Representatives	Who they are Where they operate Who they know	Establish mutual respect, Sell one self, Establish mutual benefits	We all need all the extra 'salesmen' we can get
(b) Maintain contact for mutual advantages	Who knows them		

Job Description : Sales Planning

Task	Knowledge	Skills	Attitudes
(a) Identify target	Number of unit sizes Location Present situation/usage Future needs Finance	Ability to select priorities, good administration	Time, effort and thought given to planning make the whole job easier, more enjoyable and more effective
(b) Draw up action plans	Company activities Competitor activities Distributor involvement timing Management assistance available Own time available	Good communication with managers and distributors Ability to set realistic objectives in a reasonable time scale	An agreed plan of action makes success more likely
(c) Plan with distributors	Distributor coverage Distributors representatives Credit problems Distributor needs	Motivation of distributor representatives	Liaison is essential for success

Job Description : Make Effective Sales Contract

Task	Knowledge	Skills	Attitudes
(a) Plan journeys	Geography Market days/events Whether appointments are needed	Ability to assess timing of individual calls Ability to plan journeys economically	Time and effort saved, makes work easier, enjoyable and effective
(b) Plan calls	Customer needs products available Distributor involvement Customer attitude	Ability to identify customer needs Communication with distributors	

(c) Make effective sales presentations	Products and system knowledge Economics Customer needs Selling techniques/negotiation Sales benefit Nature of objectives Alternative methods of closing	How to open an interview How to create interest How to present benefits how to overcome objections Negotiation How to close positively	Professional selling is essential in a competitive market
(d) Involve management when necessary	Own limitations of authority Customer needs Price limitations	Communication with management and distributors	A team works better than a collection of individual

Job Description : Motivate and Train Distributors

Task	Knowledge	Skills	Attitudes
(a) Identify needs for each distributor and each representative	Priority 'gaps' to be filled between company needs individual needs customer's needs	Distinguish between knowledge, skills and attitudes and establish priorities Distinguish between 'lack of' and 'need for'	Efficient profitable distribution is essential to Co's own prosperity
(b) Agree what should be done and by whom	Methods of training Other facilities available Other personnel Own limitations Own skills	Liase with management 'Sell' training to distributors and representatives Setting of objectives Planning and preparation	It is our responsibility to equip our distributors with the knowledge and skills to sell products and services
(c) Carry out training	Methods : On-the-job Off the job Product knowledge Sales knowledge Use of training techniques Preparation of aids Appropriate location:	Applying the right Method Translating knowledge to suit audience techniques and aids	Training is not only a classroom operation. Use of the right method and careful preparation is essential
(d) Evaluation on a Continuous basis	Gap in the objectives set Objectives achieved	Interpret reasons for gap Take appropriate steps i.e. change objectives, change training methods and change training contents,	All good training is continuous and accumulative

Job Description : Investigate Quality Complaints

Task	Knowledge	Skills	Attitudes
(a) Investigate the situation	Character of customer Distributor involved Representative involved Methods of : reporting, handling and delivery complaint factors Product knowledge	Look at problems objectively Assess likely causes tactfully and accurately Establish rapport with the customer	A quality complaint is an opportunity to build customer confidence and loyalty
(b) Report back to Management	In addition to above checks, place of origin Date of delivery and manufacture Interpretation of situation Recommendations for action	Accurate report Writing Accurate interpretation of facts, people and circumstances Empathetic presentation of information	The customer should neither check not gain if the complaint is handled correctly
(c) Conclude Complaint satisfactorily	Laboratory report Interpretation of report Character of customer Relation between loss and views of Co.	Selling skills in presenting information Obtaining agreement without haggling Positive closing	The customer should feel that his complaint has been handled fairly, speedily and sympathetically

Job Description : Provide After Sales Service

Task	Knowledge	Skills	Attitudes
(a) Identify what is needed: (i) For personal action (ii) For distributor action (iii) For individual customers	Priorities Customer needs Customer attitude Distributor coverage Representative's abilities	Ability to select and priorities Ability to delegate	
(b) Keep personal involvement to a minimum	As above	Tactful delegation to distributor representatives Training of representatives	
(c) Provide first-class personal services where necessary	Technical knowledge Product knowledge Management of finance and economics	Ability to provide service effectively Use service as a sales aid	Service is a tool to be used in gaining and maintaining business not an end in itself

Job Description : Support Promotional Activities and Participate in Meetings/Demonstrations

Task	Knowledge	Skills	Attitudes
(a) Apply promotional Plans in own district	Company plans Area plans District plans Distributor needs Consumer needs	Selling of promotion to: distributors distributor representatives	Use Distributors and Distributors' Representatives to sell
(b) Take part in meetings and demonstrations	Suitable venues Meeting organizations Press coverage Products/systems Company policy	Public speaking Discussion leading Chairmanship Report writing	We are professional

Job Description : Internal Communication

Task	Knowledge	Skills	Attitudes
Report competitor Activities to management Suitable speakers	Competitors representatives Competitors customers Competitors products and Policies	Accurate Report writing Objective interpretation Communication with third parties	Effective action depends on accurate and balanced reportage

Thirdly, define what knowledge, skills and attitudes each salesman has, how and what performance standards each is achieving. The collection of this information requires the setting up and constant use of an effective salesman performance appraisal system. It also involves agreement on measurement standards and techniques. Fourthly identifying the training gaps in each areas of knowledge, skills and attitudes.

Fifthly, define what additional training needs arise as a result of changes external to the salesman's past achievements and standards. This necessitates checking on a systematic and continuous basis the directions and future plans for the company's marketing planning, sales planning and recruitment functions. For example; a decision to add a couple of products to the existing product line could involve every salesman in revising his method of working, route planning and scheduling, thus giving rise to a new training need in the field. It is therefore, necessary to relate the company's future plans to its current sales force needs.

Lastly, define the training priorities for the current period, i.e., to identify what are the training needs in the immediate future, in the mid-term and in the long term, and accordingly prioritise the training activity.

Activity 1

Suppose your are the sales manager for a Kashmir carpet manufacturer. You have a vacancy in your sales force in the Maharashtra region. You want to recruit only that person who is fully familiar to the product. What type of training objectives you would have, if you wish to prepare your sales personnel fully for the field job?

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10.6 METHODS OF IDENTIFYING TRAINING NEED

For the success of any training it is of utmost importance that the training needs are identified, objectively and correctly. Training need analysis will help in identifying employees who need training and also you can set specific criteria's to measure the results of training. Some of the methods used for identifying training needs are :



10.6.1 Self Observation

Observations can work only when a salesman is observed doing his job, continuously for a specific period, by an observer.

Advantages : Observation gives you an idea about the actual working of a salesman. It is a low cost technique with minimum disruption to the work. Also, in this technique you yourself observe the salesman and thus the bias is avoided, in the observations.

Disadvantages : The major disadvantage of this technique is that the salesperson may not act normally when someone is with him as he feels scrutinized. Also you may not observe all the attributes due to infrequency of occurrence of some attributes. Another disadvantage of this technique is that sometimes it is difficult to record the observation data.

10.6.2 Reports

Any organization will have number of reports that record different aspects of job performance regularly, like, work records, sales output, sales trend, etc. A careful study of these reports can help in identifying training needs.

Advantages : You have a long track record of performance which can be used. The salesman is not aware that you are watching him. In this method, you do not incur any additional cost.

Disadvantages : As the quantum of information available through the sales reports is large, this method is time consuming.

10.6.3 Surveys and Questionnaires

These are the written forms that are completed and returned either by the Salesperson himself or by his manager, after filling them up.

Advantages : These forms bring out opinions and facts about a current situation by questioning the people involved. These are useful in getting information from a large or geographically dispersed people. The respondents can complete them at their convenience, without any distraction.

Disadvantages : If the questions are not framed in a simple language, the respondents may not understand the questions. Secondly, only those people who are interested, will generally send their reply to a survey.

10.6.4 Face to Face Interviews

A face to face interview is the process of meeting a salesperson individually to discuss issues that concern him the most.

Advantages : These interviews are helpful when you are dealing with sensitive issues that require explanatory answers. Another advantage of this process is that you can clarify things by asking questions and also you can observe the non-verbal clues.

Disadvantages : The salesperson may not like such interviews where you are making notes. Face to face interview is also a time consuming process.

10.6.5 Focus Groups

In a focus group, 10-15 salespersons meet to discuss a topic and exchange views, attitudes to give suggestions. Such discussions are useful when handling an undefined issue.

Advantages : Focus groups offer valuable but general data. With the help of focus group discussions you can identify questions and issues that can be used to conduct specific surveys.



Disadvantages : A focus group has to be followed by other types of surveys for getting specific information. A focus group is time consuming and in such studies it is difficult to quantify results.

As you must have observed, you can use any or all of the above methods for identifying training needs. Once the data is collected, you need to analyze data for prioritizing different needs that may emerge. One important point that should be kept in mind is that during these surveys certain needs can emerge that cannot be handled by training. These may include pay increases, incentives, work conditions, etc. Therefore, the suggestion is that when you are analyzing data you must focus only on those needs that can be addressed by training.

10.7 LEARNING STYLES

When you are designing a training programme, you must keep in mind that different people, learn easily from different learning styles. Therefore, you should be able to identify the best learning style. Broadly speaking any person has one of the following as dominant learning style: Activist, Reflector, Theorist or Pragmatist. You must appreciate the fact that these are the learning styles and need not reflect the personality of any individual.

Activist : An activist involves himself fully and without bias in new experiences. He is open minded, not skeptical and is enthusiastic about anything new. He is happy to take problems by brainstorming. Thus, if you are designing a programme for an activist, be sure to include situations of his participation's like, games, simulation exercises, etc.

Reflector: He likes to stand back to ponder experiences and observe them from varied perspectives. He will collect data, himself and from others, and prefer to think it thoroughly before coming to any conclusion. He prefers to take a back seat in meetings and discussions and enjoys observing other people in action. He tends to adopt a low profile. While designing a programme for a reflector, be sure to include actual case studies and experiences and guide him to make his own decisions.

Theorist : He integrates observations into complex but logically sound theories. He thinks problems through in a step by step way. He likes to analyze and synthesize. He tends to be detached, analytical and dedicated to rational objectives. rather than anything subjective or ambiguous. His approach to problems is consistently logical.

Pragmatists : He is keen on trying out ideas, theories and techniques to see if they work in practice. He is the sort of person who will return from training brimming with new ideas that he wants to try out in practice.

10.8 DESIGNING AND CONDUCTING THE PROGRAMME

For training of sales force, you can use one of the three major types of programmes. These methods are self study modules, class-room training, on the job training. However for all the programmes, the planning must be done comprehensively to ensure effectiveness of the training.

10.8.1 Self Learning Modules

In this programme, the participants are given the course material which they are required to study themselves. Written notes can be sent, and if needed audio and video cassettes can be used. This kind of training is useful when you want the participants' to revise some material or you want to send some pre-conference study material. The major disadvantage of this method is that you cannot be sure whether the participants have actually studied the material. Also, in this method, there is no feedback.

10.8.2 Class Room training

Each training programme needs to be individually planned based on the pre-decided objectives decided for the programme. However the following are the important areas that can be covered in a typical sales related programme :



- Company knowledge - history and future plans
- Product information
- Marketing strategies for various products
- Learning the features, advantages, benefits of products
- How to obtain interview with prospective customers
 - The sales presentation
 - Different ways of finding customer's needs
 - Answering objections
 - Closing the sales presentation
 - Planning geographical territory and planning each day
 - Time management
 - Administrative responsibilities
 - Communication abilities
 - Writing reports

The objective of a class room based refresher course is to reinforce some aspects in the salesmen which they are likely to forget and also to add new knowledge and skills to the salesmen. Thus, as the name suggests a refresher and development course must refresh the memory and develop the true potential of the salesmen. To truly meet its objective, a refresher course must be based on factual information. Thus complete information on salesmen's behaviour, weaknesses and general morale must be available before designing any refresher course. The information can either be obtained through a questionnaire sent to participants or through personal interviews, or any other methods, as discussed under 9.6. Some of the questions that need to be answered for running an effective refresher course are:

Planning	Does a salesman prepare and work his plan Does he keep up to date records Does he call regularly on his customers
Appearance	Is his appearance professional Does he keep his presentation material neat and clean
Attitude	Does he have a positive or a negative attitude How is his response to official communication How much is he influenced by outside influences
Selling Skills	How good is his product knowledge How updated are his selling skills Does he have knowledge of any special techniques

Once all the information is gathered, the trainer can plan different session of refresher course which can include case studies, role plays, syndicate presentations, simulations etc.

10.8.3 On The Job Training

One of the very important ways of teaching new skills to sales people is through on the job field training. The important advantage of this method offers is that the skills are demonstrated to the salesmen in the real life situation and thus the impact on the salesmen is expected to be much stronger. Also the individual salesman's needs can be identified and attended to. In on-the-job or field training, the trainer can either make a sales call himself which the salesman observes and learns. In the other method of on-the-job training the trainer gives feedback to the salesman after observing him during his sales call. The salesman, thereafter, practices the recommendations in the future calls.



Activity 2

To better identify the training needs of your sales personnel, you circulated a questionnaire. An analysis of the questionnaires revealed that your sales personnel need to learn handling of difficult customer or complaining customers. What type of training method you would use, and why?

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10.9 TRAINER'S ABILITIES

A successful trainer needs to possess various skills to do a good job of training. Some of the basic things without which a trainer cannot be successful are, thorough job knowledge and an ability to relate to the actual situations the salesman experiences. The other main abilities which a trainer must possess are :

10.9.1 Analytical ability

A good trainer is able to analyze the situations and identify the exact training needs for salespersons. The analytical ability will help the trainer to focus on issues of prime importance rather than touching superficial issues.

10.9.2 Basic Educational Abilities

A trainer needs to have the knowledge about the jobs the salespersons perform. He should also know the principles of communication. It would be still better if the trainer has some knowledge about the adult learning.

10.9.3 Training Techniques

A successful trainer needs to understand what makes people learn and accept new things. He should have clear knowledge about the different techniques of training. He should be able to employ such techniques, for maximum results.

10.9.4 Ensuring Participants' Participation

To ensure effective learning, the training session must be interactive where participants freely participate. Some of the methods employed for ensuring trainee participation are:

- Discussion Groups: Trainees are divided into groups and given various topics, issues etc. which they have to discuss amongst themselves and come up with probable solutions.
- Questions and answers period, after each session.
- Decision making exercises, e.g. finding product benefits and converting them into sales presentations for various types of customers.
- Demonstrations : These can be either trainees acting out certain role plays or video demonstrations or demonstrations by the trainer.
- Case studies: Participants attempt to find the best possible solution for a real life problem.

10.9.5 Course Organization

Once the total written material for a course is ready, the session can be put into practice. A good trainer will always keep in mind some basic rules of organizing a training session, like :

- Punctuality is essential.
- All material related to training like, slides, demonstration pieces, samples, etc. , must be carefully checked before the programme.
- The room where the training is to be held must be checked for adequate lighting and seating arrangements.



10.10 TRAINING FOLLOW UP

Training follow up refers to the time immediately following the training. This may vary from, the time when learners are still a captive audience, to possibly months or years after the training. What happens after training is vital to any training session. After any training session you must gather and analyze feedback to review training. Measure and analyze results specially in relation to job performance. Provide additional inputs, if these has been a shortfall, of similar training programmes are organised in future.

10.11 SUMMARY

In order to meet the sales and marketing objectives successfully, it is necessary for each organisation to train their sales personnel, as objectively as possible. The training activities should be tailored to the specific needs of the sales personnel and the typical market situations they face. Therefore, it becomes mandatory to identify the training needs. Once the training needs have been identified, then commences the process of executing the training programme. Activities, such as identification of teaching material, appropriate trainer and training methods, all should be decided, as carefully as possible. Lastly, one should learn from one's experience and therefore, evaluation and review of a training programme is also an important and integral component of any training activity.

10.12 KEY WORDS

Training: Training can be defined as learning to change the performance of people doing certain tasks. Training revolves around helping people to learn so as to improve their performance.

Training Needs: A training need can be defined as a gap between the desired level and the actual level of knowledge, skills or performance that can be bridged by training.

Self Learner Module: The participants are given the course material which they are required to study themselves. Written notes can be sent, and if needed audio and video cassettes can also be used.

On Job Training or Field Training: In on the job or field training the trainer can make a sales call himself which the salesman observes and learns. In the other method, the trainer gives feedback to the salesman after observing him during his sales call. The salesman, in the future calls thereafter, practices the recommendations.

10.13 SELF-ASSESSMENT QUESTIONS

1. How an applicant, before accepting a job, could appraise himself quality of training that will be provided to him?
2. Why is sales training a continual managerial activity?
3. Why is product knowledge also considered to be a sales related training need?
4. Why do sales trainers rely so much on role-play in teaching sales techniques. Discuss its advantages over other training methods?

10.14 FURTHER READINGS

The following units of the Management Programme are recommended for further readings.

MS-2, Unit 6.

MS-22, Block -1.

MS-23, Unit - 12.