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Needs Assessment and Task Analysis

Preliminary Background: Each new salesperson begins with a two day start up training. Although a lot is covered during this session, the most important goal is for salespeople to come out of training with enough knowledge and basic skills to conduct their first meeting with a prospect. We are a wedding photography company and our prospects are engaged brides. The salespeople we hire do not all have strong sales backgrounds. Hiring decisions are often made based on personality with an unstated believe that the selling skills can be taught if we can find the right type of person. The current start up training was developed by former salespeople turned managers who have little to no formal training or background in training or instructional design. There are a total of 8 sales managers who currently conduct start up training in their respective territories using the current method and tools. The primary training tool is the salesperson's handbook and although there is a general guideline of how to conduct training, there is no uniform structure.

Symptoms of the Problem: There is a lot of emphasis placed on closing the sale but not as much on retaining the sale. In looking at the statistics for the past year, the close rate has increased by 10% on average but at the same time, the retention rate has decreased by 7%. I have also gotten feedback from 5 of the sales managers who conduct training on the structure of the training being scattered and ambitious in how much it tries to cover.

Preliminary Problem Statement: Salespeople are not given adequate training pertaining to the basic selling skills needed for long term retention of customers.

Verify the Problem : Below are the three primary ways I went about gathering my information.

1. Conducted an in depth interview with the Regional Business Director in charge of 4 of the 8 sales managers. Below are the questions I asked along with the response given. Due to time constraints I was only able to conduct one formal interview.
    a. What is the primary objective of start up training? What are the essential skills our salespeople must know at the conclusion of the session?
        i. Know the history of the company and our unique business model
        ii. Know what our expectations are of their role (what performance benchmarks we expect, etc)
        iii. Understand our sales process and be able to conduct a meeting with a prospect
        iv. Have a basic understanding of our tracking systems and be able to perform basic administrative duties.
    b. What is the training/coaching background of the sales managers?
        i. All of them have managed people and had training as part of their role but none have a specialized background in this area.
    c. What would you change about the current start up training?
        i. More time for role-plays
        ii. Create more self running modules so things like CRM system walk through can be taken at saleperson's own time
        iii. Make the handbook more linear, train in the order the salesperson would experience different aspects of the client life cycle
        iv. Focus on basic selling skills and take out higher level skills and place them in a separate section (upselling, negotiating, etc)
        v. Update policies, nomenclature, procedures, some are outdated

2. A general email was sent out to the 8 sales managers soliciting feedback on their thoughts of the start up process. This was sent out prior to the start of my project so it was not a structured questionnaire. Nevertheless, the information used was helpful for this portion of my task.
    a. Some information in the handbook is outdated
    b. Structure of the material is not as organized as it should be (create tabs for easy location of sections? Put the material in a binder so updates can be easily made)
    c. Some sections are helpful for the salesperson to have but we don't cover it at all (inside sales process, all about photography, customer service guidelines)
    d. Would be nice to have tools (checklists, cheat sheets) that salespeople could take out of the manuals and have with them to remind them of how to do certain things (how to track leads, how to flag accounts)

3. Last week I had the opportunity to sit in on a two day training to experience it for myself. Here are my personal observations:
    a. Training consisted more of informational exchange vs training. The handbook was used as the primary training guide and for the most part, we basically read through it together
    b. Though there was an agenda for the day, we didn't really follow it. The agenda sheet had our old logo on it and I don't believe it's been revised for quite some time
    c. The training could have had more exercises breaking down the different components of the sales cycle
    d. There were a lot of higher level selling skills introduced that could be confusing for a novice salesperson or take away from helping a novice salesperson build their basic skills
    e. Too much time spent on administrative tasks that are not directly related to success in selling and servicing
    f. No evaluation checklists for role-play, what are the standards that each trainer is looking for?

Determine Specific Needs: I see two important and related needs:

1. Creation of a train the trainer session including things such asL
    i. How to structure the day
    ii. How to conduct meaningful role-plays
    iii. How to give and receive feedback
    iv. How to deal with the ______ (overbearing, non-talkative, unprepared, etc) salesperson
2. Re-vamping the current start up training both the layout and agenda of the two days and the handbook/training manual.

Prioritizing Needs: For my project I will focus on revamping the current start up training. Specifically I will focus on helping salespeople master the basic selling skills needed to successfully conduct a client meeting. I came this conclusion by first listing the desired outcomes of the training and then prioritizing them based on what I felt was more important

1. Be able to conduct a successful client meeting
2. Be able to set the right expectations with the bride
3. Able to overcome common objections
4. Understand and differentiate between our packages and products
5. Understand our unique market positioning
6. Able to successfully track items in our CRM system
7. Understand your resources for help and guidance

Rewrite Problem Statement: The current start up training does not place enough emphasis on the core selling competencies needed to succeed. Current training is scattered and covers many topics not directly related to closing and servicing a client.

Instructional Goals:

1. Re-design the selling skills portion of the start up training to teach basic fundamental selling skills.
2. Create a uniform agenda and structure for all sales managers to use

Task Analysis:

Test Question: "How do you conduct a sales meeting with a bride? What are the steps you go through?" I asked this of three Sales Managers who were my SMEs. There answers were pretty much the same and there was not very much variance

a. Introductions, build rapport
b. Find out more about bride's day, vision for their wedding photography
c. Share albums/prints and solicit feedback
d. Share packages and recommend the appropriate one
e. Answer questions, overcome objections
f. Close the sale

Steps of Analysis

1. Introduce company background and goals of the meeting. If bride has no questions, proceed to step 2. If she does, proceed to 1a.

1a. Overcome objections, address questions/concerns

2. Conduct assessment of needs using the Initial Interview Document. Does bride have questions at this point? If yes, repeat step 1a. If not, proceed to step 3.
3. Present albums and prints. Articulate the type of photography style being presented and use correct terminology in describing features of the album. Does bride have questions at this point? If yes, repeat step 1a. If not, proceed to step 4.
4. Review packages. Does bride have a preference for packages? If yes, proceed to step 6. If no, proceed to step 5.
5. Articulate the features and benefits of each package. Make a recommendation for a specific package based on info gathered in step 2.
6. Review the features and benefits of a specific package and articulate to bride why a recommendation for this package is made. Confirm decision with bride. If bride agrees, continue to step 8. If bride is unsure, continue to step 7.
7. Review info gathered in step 2 and determine and articulate features that are important to the bride and re-recommend a package. If bride agrees, continue to step 8. If not, repeat step 1a.
8. Confirm package selection and articulate payment plan and details. Determine if bride has questions. If yes, repeat step 1a. If not continue to step 9.
9. Confirm understanding of payment plan and complete necessary paperwork to close the sale.
10. Determine if bride has final questions. If yes, repeat step 1a. If not proceed to step 11
11. Re-set expectations with bride regarding photographer selection and how the sales process will proceed from this point forward. Determine if bride has further questions/concerns. If yes, repeat step 1a. If not, continue to step 12.
12. End.

Objectives:
My main project will be around re-vamping our start up training for our salespeople. There is a lot to cover the two day session but for my project I'll focus on the primary objective of getting our salespeople to be ready to sell to their first prospect. My first goal is for the overall training objective and the second one is specific to one of the steps within the actual sale. Here are my objectives, looking forward to your feedback!

1. During the final role play, the salesperson will be able to conduct a mock meeting that includes the 7 steps of a Model Meeting. The steps will be clearly identified by the trainer using the role-play checklist.

2. During the final role play, the salesperson will demonstrate competency in overcome common objections during step 6 of the Model Meeting. They will be able to give at least 1 response to the 4 most common objections given.

Goals:

1. Learning Goals (Desired Results) –
I am having a hard time with the goal. I am not sure if it should be a concise 1-2 sentence statement like our objectives? How specific should I be getting or do I keep it broad?

Here are some possible Goals:
-Learners will be competent in the consultative sales process and be able to perform each of the 7 steps of a model meeting..
-Learners will be able to close a minimum of 65% of the meetings they attend.
-Learners will be able to effectively articulate the products they sell, make a recommend based on the client's needs and close a minimum of 65% of their meetings

2. Assessment Evidence –
-Recall Items - List the package names, price and major distinguishing factor
-Constructed Answer Items - Given a case study of a client meeting, what product would you recommend and why?
-Simulations - Role-play
-On the spot, verbal quizzes (mainly for testing of product identification and knowledge)

3. Instructional Strategies –
-Prep work - Is this an instructional strategy? I would like new hires to read sections of their handbook prior to coming to the first day of training. Then I'd like to have them answer a few questions that would be discussed at the start of training. (i.e., what do you believe to be our company's distinguishing factors? What brought you to work here?)
-Telling stories, sharing stories of successful salespeople
-Case study discussions

Smith and Ragan Ch. 12 Strategies for Problem-Solving Instruction: Teaching our sales staff to be good closers requires problem solving abilities. As mentioned on pg. 219, problem solving must integrate knowledge representation (does the salesperson know the packages we sell?), solution planning (what package is the best fit for this customer?), solution implementation (how do they recommend and sell the package?), and solution evaluation (based on the client response, what should the salesperson do next?). A few strategies I will be using that are mentioned in this chapter are simulations and case studies. Simulations in the form of role-play helps the learner integrate their knowledge and gives the trainer immediate feedback on where the learner is at in their schooling. Case studies are a good way for the learner to walk the trainer through their thought process.

W & McT , “T” Tailoring, pg 224: This is a key point as our salespeople come from various backgrounds from seasoned sellers to newbies. We do not separate learners based on background so it is imperative that a trainer can teach to different levels in the same session. In terms of designing lessons, I need to make sure I am designing a variety of exercises the trainer can pick and choose from depending on the experience level of the audience. For example, a new salesperson would need exercises that are much more directive whereas a veteran salesperson would focus more on higher level skill building.

Foshay, Silber and Stelnicki, YCDI: WIIFM is something I use in all my trainings but I have never thought of the YCDI which makes sense and is closely related to WIIFM! Helping a new employee feel successful at their job aids significantly in retention efforts. One thing I plan to do is for people without a strong sales background, is design an exercises showing them they have inherent selling skills and use them in their everyday life, they just may not recognize them as selling skills. Once they see that they do lot of things naturally (build rapport, ask questions, etc). they will be more open to some of the tougher material later on in the training.

Formative Assessment

1. Review of Pre- Training Exercises - I plan on having our salespeople review materials prior to the start of training including reading about the steps to completing a client meeting, company background, etc. Review of this before the start of will help give the trainer a better understanding of which sections of training he/she may need to focus more time on.
2. Informal Checks for Understanding – I plan on having these throughout, esp at the end of any direct instruction segment In the trainers guide I will give direction for when questions should be asked and what type of questions they can use to open up a discussion.
3. Reverse Role-Play – Here, the trainer will role play segments of the client meeting and the salesperson will give feedback on what went well and what was missing. The grading rubric will have been introduced and I may have them use this as their guide.
4. Self Assessment- At the end of day 1 of the 2 day start up training, they will complete a self assessment to be reviewed at the start of day 2. This will help the trainer re-focus the day if necessary to cover material that the learner may still be struggling with.