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Sales Training Design Guide

How to know when you need sales training and how to get the most out of your investment in people development

Kvadrant Consulting 2024

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The challenge isn't lack of investments in sales training, it's making sure that we get the value we need from it

Every year business leaders spend $billions on sales training because it matters to sales performance and people engagement.

- According to CSO Insights 2015 study of sales training impact, enabling your salesforce with structured high quality sales training increases (a) share of sales reps meeting their quota, (b) average win-rates and (c) lowers employee turnover rates.
- High performing sales teams are 4.8x more likely to rate their sales training as good, than poor performing ones, according to Salesforce 2021 State of Sales report

Sales training matters and with all the changes that are happing these days to the way buying gets done and selling can happen, research also shows that it probably matters now more than ever.

A 2022 Mckinsey study showed that 97% of sales leaders see reskilling -and upskilling as a top-priority with more than half of them not seeing that the majority of their salesforce has the skills required to succeed today.

Good sales training matters to performance and especially in a fast-changing selling -and buying environment.

The challenge isn't so much lack of investment. With average sales training spend per salesperson having gone up 38% from 2015 to 2020 companies are spending more than ever on getting their sales organisation trained.

The challenge is that about half of salespeople don't think their training is very good (Salesforce State of sales report 2021).

Knowing that good sales training leads to sales performing and people engagement, that we need now more than ever, and given how much money is spent on sales training each year;

How do you design, build & deploy the right sales training for your organisation to deliver the performance improvements you need?

4.8x

More high performing sales teams are likely to rate their sales training as good, compared to low performing ones

Salesforce 2021

97%

Of sales leaders see up-skilling & re-skilling of people in sales as a top priority

McKinsey 2022

38%

Increase in avg. training spend per salesperson from 2015 to 2020

ATD Research 2015 & 2020

1/2

Of salespeople still rate the sales training they receive as sub-par

Salesforce 2021

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5 steps to design, build & deploy more effective sales training programs

1.

Qualify if sales training is the best solution for your business challenge

Sales training is a great solution, it’s just not always the ***right*** *one*

Sales training is a good solution for a specific problem, but it isn't always the solution

You are the head of sales at a large company and your growth has been steadily declining for a year now. The rest of your executive suite are demanding action and something needs to be done, but what?

Well, a potential solution that's often thrown on the table in these kinds of situations goes something like this; "Let's get our salespeople trained".

Companies that train their salespeople perform better, ergo we should train our salespeople to improve sales performance. It's a nice and simple solution that's easy to align around and we sort of know what we are getting. Let's get some training.

And it might very well be right and work. A sales capability development program to close gaps in knowledge, understanding, ability and motivation might be exactly addressing the causes of poor sales performance.

The only problem with this approach is that we don't know whether the lack of understanding, ability and motivation in people is actually the problem here.

- Maybe the market has changed and growth is coming from new customer segments but you haven't aligned your sales strategy and coverage model to this change.
- Maybe buying has changed and more sales opportunities should be generated from digital marketing, but you haven't set up your marketing organisation to succeed with this
- Maybe the salesforce is overburdened with all kinds of other things they need to take care of and don't have enough time for selling activities.

There can be a million reasons why selling isn't performing as it should and lack of knowledge, clarity, ability and motivation to do the right things at the right times in the right way is just one of them.

Potential causes

Strategy: “We have the wrong strategy in terms of which segments and account types we are targeting”

Process: “We have poorly designed processes that don’t fit how we should be working today”

Leadership: “Our sales managers and sales directors are not set up with the right structure, tools and ways of working to enable sales team success”

Technology: “We are spending too much time working in an old and cumbersome CRM system”

Understanding & ability: “We don’t have the knowledge, skills and ways of working to succeed with selling –and account development”

Business challenge

- Declining opportunity win-rates
- Low growth on key accounts
- Too long time-to-performance for new hires

There are three changes typically causing the need for sales training

There are roughly speaking 3 reasons that should indicate to you that you might need sales training, all related to a gap between what the salesforce should have understanding, ability and motivation to do today and where they actually are.

What these changes do is create a gap between where the sales organisation is today vs. where they should ideally be to perform and be engaged, with regards to what they know, are able to do and feel motivated to do.

It is this gap that sales training aims to close

The change	**1. The world has changed:**	**2. We have changed:**	**3. Our people have changed**
What is changing	Our customers are changing, with regards to how they buy, how they prefer to engage with vendors and what they value.	Our company is changing, with regards to what we sell, the roles and responsibilities we have involved to get selling done and the markets and customer types that you sell to.	The people that we have working in our organisation have changed, with some leaving and new ones coming in.
Examples	*Changing preference from face-to-face meetings towards virtual interactions* *More people involved in the average buying process* *More time spent researching independently online*	*New solutions being launched* *New CRM system or sales enablement platform* *New customer segments and types being targeted*	*Change of roles and responsibilities around selling* *30% of the people in our salesforce have changed over the past 3 years.*

Four typical ways to understand if you have an opportunity for improvement through people development

The purpose of sales training is to close those gaps, to improve sales efficiency, effectiveness, wellbeing, and motivation to act, with four simple ways to understand if you actually have a gap that needs to be closed:

Four ways to qualify your need for sales training

A. Define assumed gap (especially when you are doing something new)

“We are launching a new solution to a new customer segment which requires (a) new solution knowledge, (b) new customer segment knowledge and (c) ability to engage with target customer stakeholders around new solution to create interest and drive buying decision forward towards purchasing decision. We have not trained our people in any of this so we will assume that these are gaps to be closed.”

B. Ask the salespeople (especially when the world has changed):

“To which extent do you see the importance of being able to engage virtually/remote with buyers during the sales process (1-10)? How well equipped do you feel with knowledge and skills on how to best do this (1-10)? Are there other factors that you feel are holding you back in this area? (poor technology, ineffective processes, lack of management support etc.)

C. Ask & enable the managers/leaders to observe & evaluate:

“Reviewing how sales proposals get done today, I think we could win more deals if we were better at creating more structured and customer-oriented proposals”.

D. Standard sales capability assessment tests:

“Having had our salesforce conduct a standard personality, attitude and capability test, it looks like we need to focus on making our sales teams better at more proactive sales opportunity creation.”

The ultimate test of whether you need sales training is how qualified your business case for it is

The first step to ensure that you get impact from the investments you make in sales training is ensuring that you actually give it to people who need it, where they need it.

What data-backed assessments on capability gaps allow you to come up with the ultimate answer for whether there is a need for sales training or not

Is there a business case that you can formulate and substantiate like this?

The structure of your Potential business case for sales training

1. **Current state:** Our sales organisation sees structured territory planning & management as critical to success (8.9 out of 10 score on importance) they do not feel they have the clarity on how it is best done and the skills to do it today (3.7 out of 10 score on ability).

2. **Desired state:** We know the best performing sales organisations takes a structured approach to sales territory management, using data to analyse their market, analysis to identify important focus areas for action and planning/goal setting for action taking.

3. **Business case for training:** Sales organisations that excel at territory planning & management get 5% more sales with the same resources. With $100m in annual sales today, bridging the knowledge/skill gap here could add an extra $5m to the topline without adding more people and higher sales growth rates in the years after that.

Key take-aways

- **Good solution but not always the right one:** Sales training is a good solution to solve growth and go-to-market challenges, but it isn't always the right solution
- **Three typical changes that drive need for training:** The need for sales training arises from three typical changes: (1) The world that selling is happening in is changing, (2) the business that is doing the selling is changing or (3) the people in the sales organisation is changing
- **Gather data to qualify need:** Gathering data from the organisation on importance vs. ability gaps is a great way to qualify whether sales training is actually needed, or something else is.
- **Build business case as the ultimate test:** Whether you can create a business case for sales training is the ultimate test of whether you might need it or not.

2.

Specify who needs to be trained and what they need training in

Using broad ”how to sell” training likely to be like fixing cracks in the wall with a coat of paint – not very effective

Using broad ”how to sell” training likely to be like fixing cracks in the wall with a coat of paint – not very effective

In general we train people in the things that are (a) important for them to succeed in their role and (b) where they currently lack understanding, knowledge, abilities or attitude to perform as well as they could.

For people with selling -and account development responsibility, that typically falls within three categories of training:

Three types of training for people involved in selling

1. **Sales discipline training:** Learning how to conduct specific areas of responsibility to best-practice standards, through the selling and account development process. Social selling, prospecting, sales meeting management, proposal writing, negotiation, key account planning & management etc.

2. **General skill training:** Learning what the best are good at, that can be applied across multiple areas of responsibility through the selling -and account development process. Time-management, communications & writing, structured problem solving, relationship building, collaboration etc.

3. **Customer & solution understanding:** Learning the characteristics of who is being sold to, what is being sold and how target customer -and stakeholder types get value from the solutions they buy, to apply this to general skill areas (e.g. more effective communication & writing) or sales specific ones (e.g. more effective sales meeting management).

The purpose of all sales training is to help people responsible for generating sales and developing business engagement with customers acquire the knowledge, understanding, skills and attitudes required to do so.

But trying to fix sales challenges with broad “how to sell” training is a bit like fixing cracks in the wall with a coat of paint – it might feel good and probably doesn’t hurt, but it’s not likely to do the job very well.

For training to be relevant and effective for the people involved, it needs to be attached to what they are responsible for succeeding with and the capabilities required.

Examples of the three types of sales training used to close performance gaps through capability development

Sales areas of responsibility	• Creating new opportunities to sell • Managing qualified sales opportunities towards closed deals • Managing accounts for development in business engagement
1. Sales discipline training	Territory planning & management; Social selling & prospecting; Sales meeting management; Proposal writing & negotiation; Account planning & management
2. General skills	Time management Communication & writing Structured problem solving Performance management & self-development Collaboration & relationship building
3. Customer & solution understanding	Product/Service/Solution training Customer & industry training Stakeholder/role training

Training should be role-specific but can involve multiple roles required to solve the problem

The purpose of sales training is to equip people involved in selling –and growing customers with the knowledge, understanding, skills and motivation to succeed with their activities that drive selling and customer business development.

And there was a time when the answer to "who might need sales training" was pretty straightforward;

Salespeople needs sales training

Today however, most mature commercial organisations don't just have one role (the salesperson) involved in growing sales, but have different types of roles involved with different types of responsibilities, for good reasons

Reasons why sales training might be for more than "salespeople"

- High performing sales teams are 2.3x more likely to work with selling as a team discipline (Salesforce.com – State of Sales report)
- The win-rate is 3.6x higher for deals where multiple people collaborate around winning, compared to "lone-wolf" salespeople doing everything themselves (gong.io)

Sales executives, technical sales specialists, inside sales reps, customer success managers. They all have a responsibility for driving growing sales and specific tasks related to it that they need to be able to perform well and all might need training in order to so so.

The key to good training is making sure it's designed to help people do their role-specific jobs better and succeed.

Sometimes that means your training only involves one type of role if they are the only one who has responsibility for it and need to master it (e.g. If the sales executive does the negotiation, they are the one that needs to master it)

Sometimes it means your training should involve multiple different roles that each need to be trained in role specific things in order to address the challenge you have (e.g. if both sales executives and technical sales reps are responsible for proposal writing, they both need to master it).

Who you need to involve in your training for the specific sales challenge that you are trying to solve (e.g. declining growth on key accounts) depends on who is involved and whether they have a capability gap that needs to be closed for them to do their job well

Role	Responsibility examples	Capability requirement examples
Direct Sales Executive *Growing sales through direct engagement with targeted end-customers*	**Prospecting:** Create new opportunities to sell on new potential customers	Ability to research, prioritize and reach out to create interest in meeting to learn more
	Interest creation: Meet with buyers to inspire to start buying process	Ability to pitch and manage sales meeting to uncover customer pains and needs
	Opportunity management: Guide buying committee towards purchase	Ability to conduct structured problem solving, build business case and manage stakeholders
	Proposal writing & negotiation: Craft winning sales proposals & negotiate	Ability to write customer specific sales proposals and manage negotiations to close
	Key account mgmt.: Engage with key accounts to grow business engagement	Ability to identify & address opportunities for value value creation on existing accounts
Distributor Partner Manager *Growing sales through management & enablement of distributor partners responsible for selling to end-customers*	**Partner portfolio mgmt.:** Optimize portfolio of partners	Ability to research, prioritize and reach out to create interest in meeting to learn more
	Partner recruitment: Identifying, signing & onboarding new partners	Ability to pitch and get new partner business started
	Partner management: Engage with partners to grow joint business	Ability to engage with partners to identify and address unexploited opportunities for growth
	Partner enablement: Help buyers win more deals	Ability to create interest and train partners in how to sell their offerings
	Negotiation & contract mgmt.: Evaluate, negotiate and close partner contracts	Ability to negotiate, formulate and enforce contracts written with partners

Five questions to make sure you are training the right people in the right things

Sales training is a specific solution (people development) to a specific challenge (lack of knowledge, understanding, ability or motivation) that causes and identified business problem related to sales (declining new business sales, low key account growth, low profitability from high discounting etc.).

Five questions to make your training specific & effective

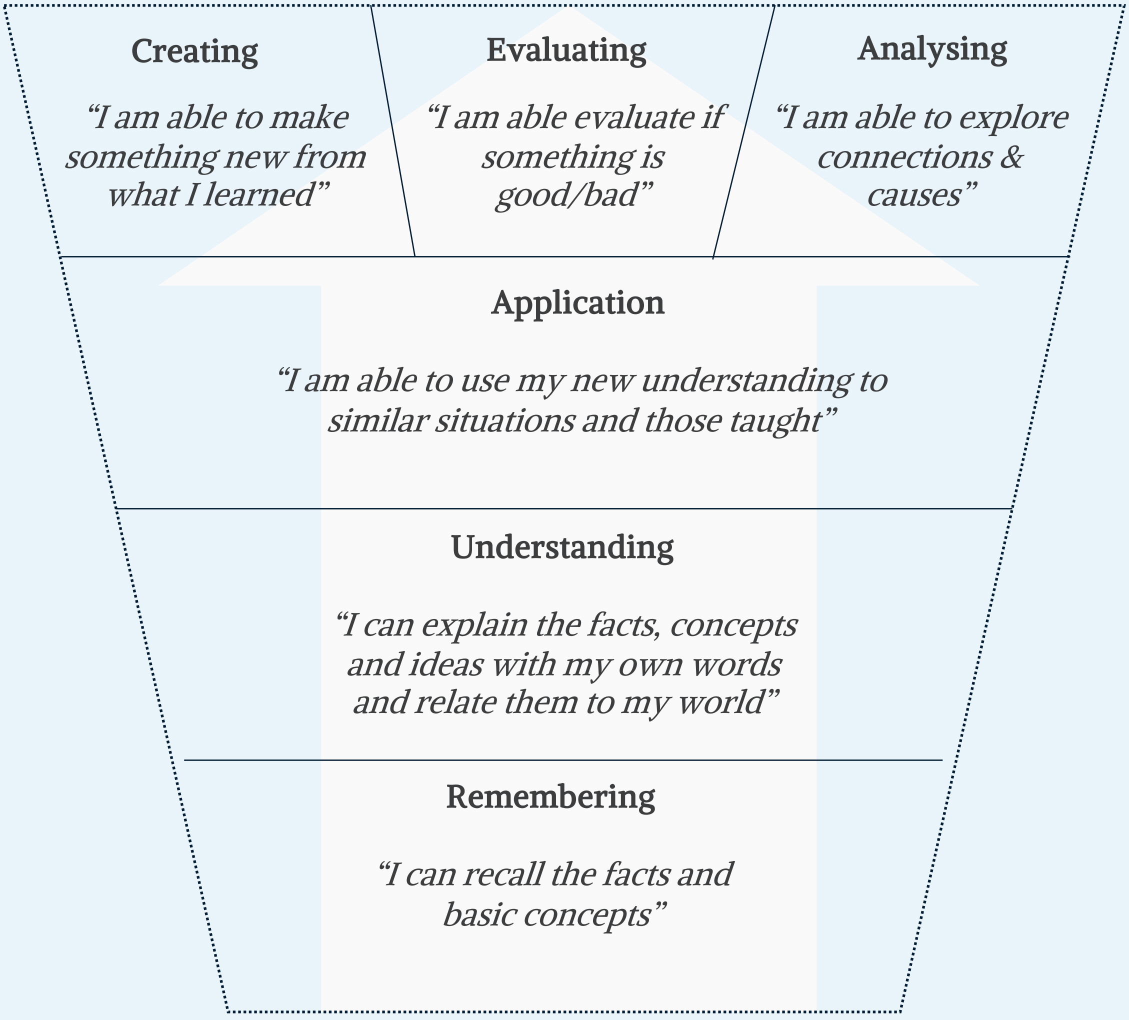
How effective that solution is depends on how well you have specified specified your solution with regards to five questions:

1. *Which roles have a responsibility for tasks related to the specific challenge that you have identified needs solving?*
2. *Are the tasks something the roles involved need to do together (e.g. proposal writing), do individually (e.g. prospecting but from two different angles) or both?*
3. *Which sales discipline specific skills, general skills or company/solution/customer knowledge needs improvement to enable better performance?*
4. *What new knowledge and understanding is required?*
5. *What new abilities are required to translate new knowledge and understanding into changes in behaviour towards best practice?*

The more specific you can be about who needs training in what in order to perform, the better able you are to design, build –and deploy learning & development programs relevant to the challenge you are trying to solve and relevant to the people you are working to solve it through.

Blooms learning & development taxonomy

Helping people get better at their job by moving them up the learning & development hierarchy, from starting to know –and understand something towards being able to apply to work and use new ability as platform for continuous improvements and helping others



Key take-aways

- **Three types of training:** There are three types of trainings that you could decide to include in your sales training; Sales discipline training, general skills training or customer/solution training.
- **Higher training effectiveness the more specific you can be:** The more specific you can be about where you have a knowledge, understanding, skill or motivation gap holding back performance, the more accurate you can be at deciding on the right solution (training) to address it.
- **Combine as needed:** Sometimes the gap can be closed with one of the three types of training, but more often what you need to train in is a combination of the different types.

3.

Design, build & deploy learning & development journeys that drive change

“Classroom training isn’t wrong. It’s just not very effective if it’s the only thing there is”

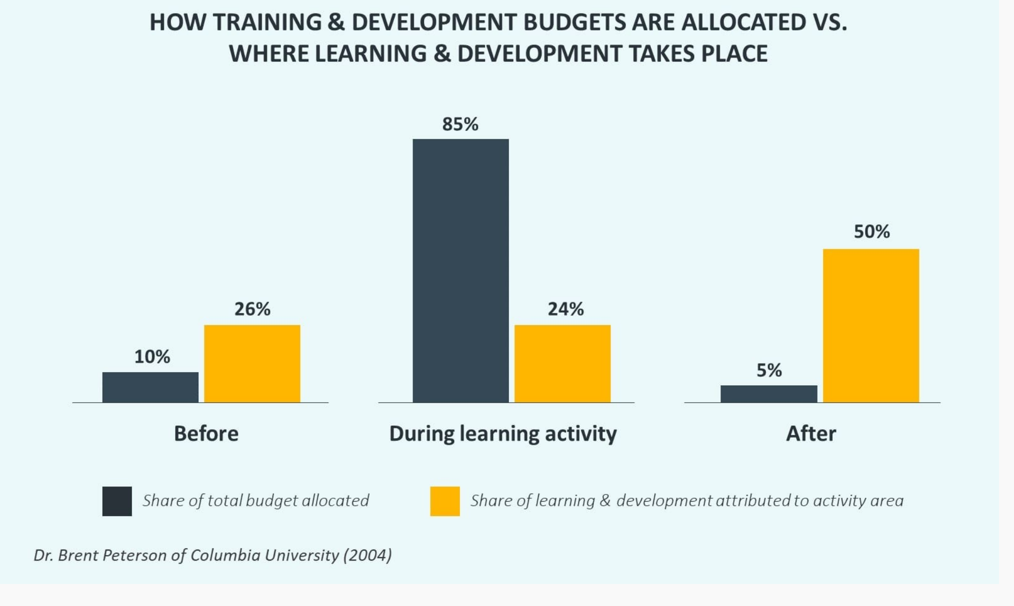
For training impact focus on more than what happens in the classroom

We often equate sales training with the activity of getting a group of people together in a physical or virtual classroom and teaching them something new to help them do -and perform better. A 4-hour social selling course, a 2-day account management course, a 2-hour refresher on virtual meting management.

Not that there is anything wrong with time-bound instructor-led training sessions. The only problem is that too often these activities stand alone, despite the fact that people learn new things over time and as a result of activities before the training session and afterwards

As shown by one 2004 study from Columbia University, although most of the learning & development happens before -and after the learning activity (i.e. training) the vast majority of resources are allocated to the training activity and too little for the things before -and after.

To get impact from the sales training you invest in, focus just as much on the things that happens around the classroom as those that happen inside it




Coaching session with manager
Practice with AI training agent
Practical application homework
Classroom training
Peer-to-peer training preparation
Online quiz in game format
E-learning self-study
Onboarding meeting by manager

Develop new capabilities and behavior in focused sprints instead of everything in one go

Imagine that writing and written communication was a big part your daily work life and you wanted to become more effective and efficient at it. You researched online and found two options both teaching the same thing but in two different ways

- **Option 1:** Two-day course with everything taught in one go
- **Option 2:** 4 x half-day courses over 4 weeks, each focusing on a new capability to become a more effective and efficient communicator in writing

Which would you choose to maximize the amount of learning and development that translated into new behavior and habits for improved results?

The purpose of sales training is to change behavior and habits for performance improvements and as anyone working with change knows it doesn't happen over night and its hard to succeed with when you try to change multiple things at the same time.

For this reason effective learning & development journeys for capability development, that translates into behavior change and sustained impact, are designed around two key principles:

Two design principles for effective sales training design

1. **Focused development:** Break your training into smaller parts with each development sprint focused on learning a specific thing and developing the behavior associated with it. Don't try to change everything in one go.
2. **Leave space for behavior change:** Spread out the learning & development journey to allow time for practical application of new behavior and new habit formation. Don't try to change everything at once.

People best learn and develop by focusing on getting better at one thing at a time instead of spreading themselves out thin over multiple development areas and to be effective your sales training program should be designed around how people best learn and develop

Break your sales training into smaller learning & development sprints and spread it out over longer time to allow for behaviour change and sustained impact through new habit formation

Example of mastering Key Account Management through focused development sprints

Effective learning & development journeys are built from different types of interventions

To make learning and development effective we design learning journeys that make use different types of learning -and development interventions to drive capability development and change forward for the people involved.

- **Self-study:** Participants consume -and engage with content on their own, in the form of reading material (articles, guides, books etc.), e-learning videos, podcasts etc. typically as preparation before instructor led training sessions
- **Quiz, tests & games:** Participants take quizzes, tests or play games to self-evaluate where their knowledge and understanding is strong and where it might need improvement
- **GenAI training agents:** Participants practice situations in focus for training (e.g. customer meetings) with AI trained agent
- **Peer-to-peer group meeting:** Participants meet physically or virtually in smaller groups to discuss learnings from self-study or instructor led training session and how to start applying to day-to-day work.
- **Instructor led trainings:** Participants meet physically or virtually in training session led by instructor who facilitates learning -and ability development through teaching, exercises and guidance on next steps for further development.
- **Application practice homework:** Participants use new knowledge and tools from self-study or instructor-led trainings and practices application of these to real life situations. Learned how to become better at social selling? Practice for skill development by making 5 new LinkedIn posts over the next two weeks
- **Peer-to-peer coaching:** Participants use each other to get feedback on what they are doing well in relation to what they learned and where there might be room for improvement.

- **Manager-led team meeting:** Participants meet in their team with their manager, who facilitates session about learning -and application experiences, enabling peers to learn from the collective experience of the team.

- **Manager-led one-to-one coaching:** Participants meet one-to-one with their manager to get help identifying what they are doing well (and should do more of) in relation to what they are learning and new actions that might help them do even better

- **Change communication:** Participants are engaged throughout the entire learning journey with change communication. The bigger the change the greater the need for change communication.

Driving forward learning and development for change in behaviour and improvements in results is like change management; it doesn't come from just one activity (e.g. classroom training).

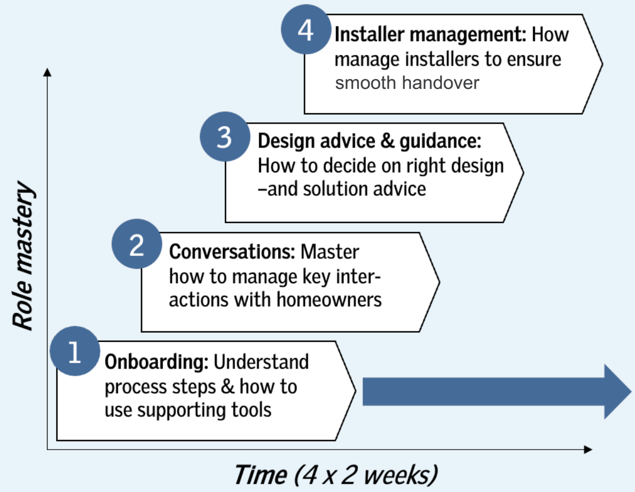
It is the product of different types of interventions spread out over longer time, to allow for new things learned to translate into new actions and habits.

Possibilities for learning & development building blocks

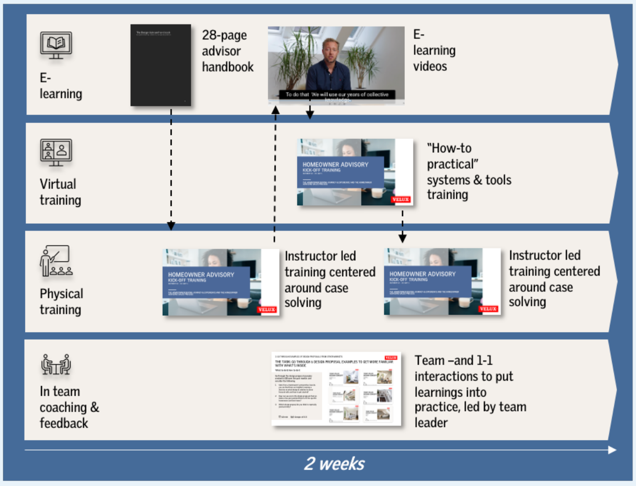
Self-study (e.g. e-learning)	AI training agent (e.g. as chatbot)	Self-study (e.g. e-learning)
Peer-to-peer coaching	Classroom training (in person or virtual)	Sales manager coaching
Quiz, tests, games	Practical application homework	Change communication

Example of learning journey split into disciplines/skills being taught and change enablers used

THE ADVISOR'S LEARNING & DEVELOPMENT JOURNEY



BLENDED LEARNING JOURNEY IN EACH SPRINT



- Overall learning journey broken down into four 2-week sprints, each focusing on equipping the participant specific knowledge and skills required to succeed
- Each 2-week sprint driven forward by a combination of (a) self-study (reading material and e-learning), (b) virtual training sessions (c) classroom trainings and (d) coaching and knowledge sharing in teams

Key take-aways

- **Classroom training may be part of your solution, but it shouldn't the only one:** The purpose of sales training is to help people develop new knowledge and abilities required to succeed, and although a physical or virtual class-room training might be a part of that it is not effective when it is the only thing.
- **Combine change enablers for effective learning & development:** Learning & development journeys are designed using many different types of learning and development enablers, from self-study content and classroom trainings to peer-to-peer coaching and change communication.
- **Focus development in sprints:** To the learning journey that most effectively develops the knowledge and skills in scope first break down the development into development sprints that focuses on developing one ability at a time and develop that ability through a mix of different learning & development enablers delivered in sequence of each other.

4.

Do what you can yourself and get support where needed and where it matters

External support can be a good help, but no substitute for bringing your unique knowledge into play

Five roles & responsibilities to design, build & run effective learning & development journeys

Besides the participants who will take part in the training, designing, building & running learning & development journeys for capability development requires five roles:

Five hats to wear when designing, building & running sales training programs

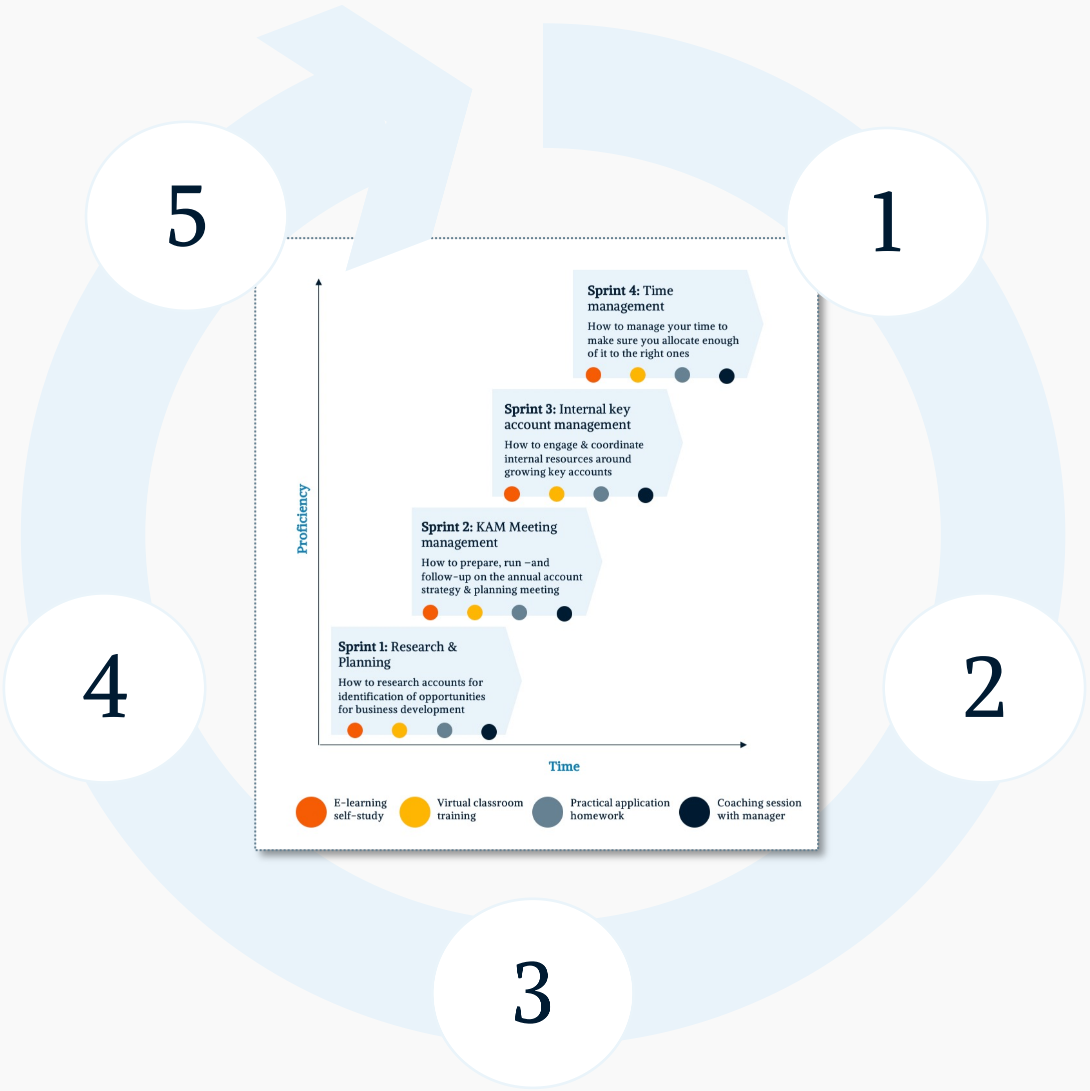
- **Designer:** Someone to decide on what needs to be trained in, how to split the development into learning & development sprints and how to run each sprint through a mix of different learning and development formats (self-study, classroom training, coaching etc.).
- **Creator:** Someone to create or tailor the material, exercises and tools that the participants will learn and use for development of the new capabilities in scope.
- **Trainer:** Someone to teach the material, exercises and tools to the participants and ensure understanding and clarity on how to apply to day-to-day work, through virtual -or classroom trainings.
- **Facilitator:** Someone to take responsibility for facilitating the team -and one-to-one learning and development sessions and change communication to these.
- **Change manager:** Someone to ensure the learning and development journey is properly set up and people with delivery responsibility are in place, the right people are onboarded to the learning journey and guided through its different steps and impact is measured and documented.

For smaller trainings it might be a single person taking responsibility for all five roles, like when a sales manager puts together and delivers a training program for their own people, and for more extensive learning and development programs there are most often multiple people involved wearing different hats.

This is also always where the question of whether external support should be used and if so which role(s) you would like support with from an external partner.

You might be able to design -and build learning journeys on your own, but may be able to do so quicker and better using the experience and material that an external partner already has.

You might be able to get your sales leaders to do the training themselves, but may get more out of the training if they are involved as participants and facilitators, instead of also being the trainers.



1. Designer	Split development objectives into development sprints and combine learning & development elements into learning & development journeys
2. Creator	Gather insights and produce content, material and tools required to deliver each learning & development elements and the journey as a whole
3. Trainer	Teach participants key knowledge, tools & concepts and help get started on practical application
4. Facilitator	Guide participant adoption of learning into development and change in behaviour and habits
5. Administrator	Ensure learning journey is set up, participants participating in different elements along the learning & development journey and track impact

If the potential impact is large enough, it may be worth getting external support

The extent to which you might need external support to design, build & run your learning journeys depends on four things things:

Four questions to evaluate need for external support

- **Do we have the knowledge, expertise and resources in-house already?** If you already have specific people hired to build training modules and learning journeys, train people and administer learning journeys, you should be able to do the majority in-house without external support, except for maybe sparring and guidance based on external experience.
- **How new is this to us?** If your need to teach people something you do not have prior experience with, a clear idea of "what good looks like" and how people best develop the knowledge and skills to build best-practice habits, you might benefits from drawing on the experience of others who have done it before.
- **How fast do we need to get it done?** If time is not a bottleneck, even if it is something new and you don't have a great deal of resources to get it done in-house, you could be able to figure it out yourself through own research and development.
- **What is the potential impact?** If the learning -and development program is only for 5 people, the investment required in external support may not justify the potential impact it can create and you should do it yourself.

If you already have an organization with the knowledge, expertise and resource availability to design, build & deliver the learning journeys in scope, it isn't something that is completely new to you and you have good time to get it done, you likely need a minimum of external support to succeed with it.

If you don't have a big sales capability development team of experienced designers, content creators and trainers, you are trying to do something new and need to get it done fast, you can likely benefit from it.

If the potential impact is large enough it may be worth getting external support to ensure it is successful either way.

Key take-aways

- **5 hats to wear:** Designing, building & running effective learning & development programs requires five roles; Designer, creator, trainer, facilitator and change manger
- **May require multiple people involved or may just be done by one person:** For smaller trainings one person may assume responsibility for all these roles and for broader and more encompassing training there are more often multiple people involved assuming responsibility for different roles.
- **Do what you can and get support where needed or when important:** The extent to which you might benefit from external support to take responsibility for one or more of these roles depends on (a) the level of internal knowledge, experience and available resources, (b) how new what is being trained in is to you, (c) how fast it needs to get done and (d) what the potential impact is when it succeeds (or fails).

5.

Measure the impact of your training for continuous improvements

*Measure your **training's impact** by linking it to new skills that influence behavior and ultimately help you achieve your business goals.*

Use a training impact framework to connect learning development to business outcomes

Bridge training to business outcomes

Whether you invest in external expertise to design, develop, and implement sales training programs or manage them in-house, such initiatives demand resources. Like any investment, they need to deliver **tangible business results** to justify the expenditure.

There are three reasons why we want to measure the impact of the investments we make in capability development and training:

1. To demonstrate the business value of people development so you can justify why the business should keep investing in it.
2. To learn what works well when doing capability development so you can continuously make improvements to how you design, build & run it.
3. To be able to identify potential challenges that needs addressing as you run the capability development program so you can intervene as it is happening.

That said, identifying the direct impact of training on business performance is challenging.

Training is only one of many factors influencing sales success. If the product doesn't meet market needs, or if sales enablement and sales management are not well run, even the most thoroughly-designed training program won’t achieve desired business outcomes.

Companies wanting to measure the impact of their training can set up a multi-level framework that links training to business results across five levels.

Training impact measurement happens across five levels

1. **Business results**
   We can show improvements in overall business results. For example, linking the sales training to ultimately changes in sales generated revenue.

2. **Objectives**
   Participants show improvements in the performance indicators linked to what they were trained in, due to changes in behavior. We can measure objectives in the CRM system across the sales process.

3. **Behavior**
   Participants show changes in behavior that is closer aligned with best-practice required to succeed. Behavior can be measured as the on-the-job changes ideally through verifiable outcomes from sales activity matrixes to give good indication.

4. **Ability**
   Participants are able to show that they are capable of applying new learnings to the tasks in scope that they are responsible for. The evaluation should be done on an individual level, managerial level, and via structured tests.

5. **Knowledge, understanding & attitude**
   Assess the participants' initial reactions to the training. Ideally the training should resonate as enjoyable, stimulating, and directly relevant to their work. This is the first step to see if training is on the right track.

Consider your impact framework from the outset when establishing training rationale

Establish training impact logic

Think of your training impact framework as a pyramid.

Start at the top with the business goals you want to achieve, then break these down into specific objectives by asking *'how'* you'll reach these goals. Next, look closer at each objective to understand the behaviors that will help you get there.

Just like that, from the bottom up, ask 'why' the skills learned in training matter. What actions will they lead to? Why are these actions important?

In sum, make sure to sense check your training plan by asking '*why*' from top-down and '*how*' from bottom-up along the impact framework.

Break down desired training impact

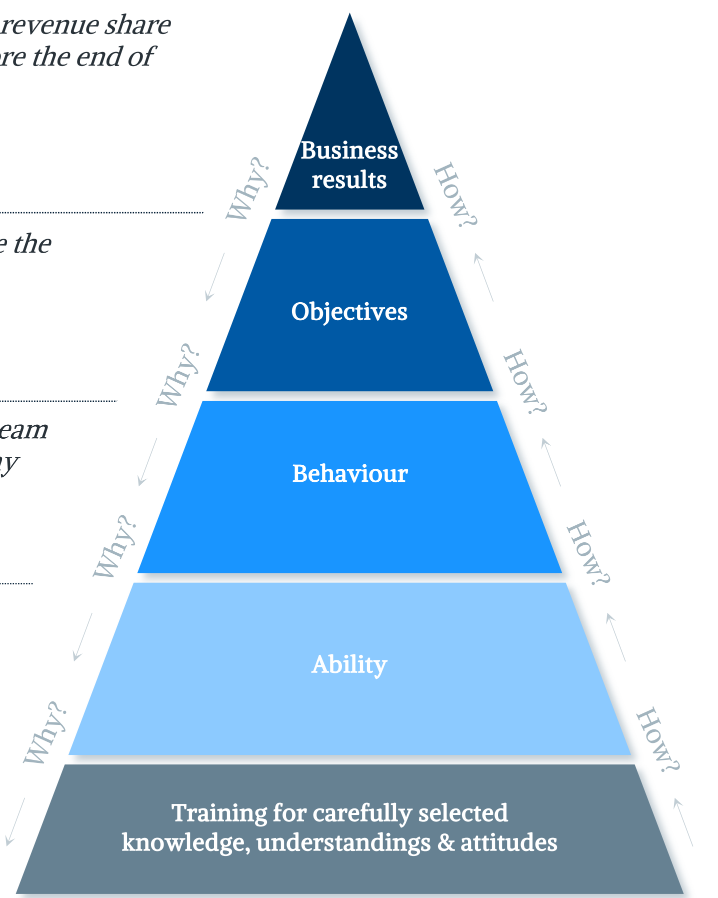
We would like to increase our revenue share from new business by 5% before the end of the fiscal year.

To do this, we need to increase the # opportunities created from new logos by 20%.

To do this, we need our sales team to be more proactive in the way they sell.

To do this, we need them to be better at prospecting.

So, we train them in using social selling for outreach.



Access four typical information sources to measure the impact of your training program

The ultimate thing we would like to be able to measure when it comes to training is improvements in the business results that we are after, like growth in revenue or improvements to margins.

While these are most often quite easy to measure (we know how much we sell and what our profit-margins are), they are also less useful as stand-alone measurements to track the impact of sales training for two reasons:

a) **They are lagging indicators:** If we train people in key account management it may take a long time before we can see it in the business results and we are unable to take action in a timeline manner if something needs to be changed.

b) **They are very general measures of impact:** If we train people in key account management and sales does go up, we have no idea of knowing if the results improvements were caused by the training.

The purpose of impact measurement is to allow us to course correct in good time so we can meet our training objectives. To do this, we need to supplement the tracking of business results with one or more leading indicators. Typically, we derive these indicators from four primary sources:

Four ways to measure leading indicators of sales training impact

1. **CRM data:** Use data from CRM system to track impact of training on behavior, based on activities people are logging, and objectives that drives business result achievement (e.g. # of deals created, % avg. win-rates etc.).

2. **Post training test & survey:** Use data from tests and surveys of training participants to understand training impact on understanding and ability

3. **Manager observations:** Use data from manager observations and assessments of training participants' abilities within the areas trained

4. **Customer survey:** Use data from customer surveys to assess impact of training on customer perceptions of engaging with participants trained

Although leading indicators of training impact around new knowledge, abilities or behavior are typically harder to measure than business results, they are more valuable in terms of enabling action-taking where needed and when needed to reach final desired objectives and business results.

Impact measurement example (Key account management)

Business results	Measure revenue growth from key accounts			*Lagging indicators*
Objectives (business result drivers)	Measure # of deals created on key accounts	Measure % share of key accounts with declining sales (-10% goal)		
Behaviour	% share of key accounts with joint growth plans in place with customer	% share of key accounts have executive sponsors that we engage with regularly	% growth in new connections between our people and account stakeholders	
Ability	Ability to research and develop joint business development plans with account stakeholders	Ability to engage with business executives	Ability to coordinate network building and drive collaboration	
Knowledge, understanding, attitude	How to conduct account research, develop key account business plans and engage with key account stakeholders co-create How to get meetings with senior executives, how to conduct senior executive meetings, how to manage key account senior executives How to coordinate key account management and how to drive collaboration			*Leading indicators*
Sales training modules	Train people in key account management			

Key take-aways

- **Consider establishing an impact measurement framework** to justify investments in capability development and identify successful training approaches for the future.

- **Develop your training impact logic and measurement framework** by breaking down the desired impact across five levels:

    1. Business results *(e.g., revenue or margins)*
    2. Objectives *(e.g., sales KPIs)*
    3. Behavior *(e.g., CRM activities)*
    4. Ability *(e.g., better discovery skills)*
    5. Knowledge, understanding & attitude (*e.g., sales questioning techniques)*

- **Don't neglect the measurement of leading indicators** such as skills and behaviors, alongside lagging indicators like business objectives and results. For example, you can use CRM data, post-training tests, manager observations, or customer feedback to capture some great leading indicators of training success.

6.

Closing must-haves and considerations for effective training

Create learning journeys that can be repeated and are built to last

Five additional considerations to get the most value out of your sales training investments

1. **Be careful building learning journeys that can't be repeated:** People in your organisation will change and even those that stay for longer might need to get previous learnings refreshed from time to time.

   Make sure that your training programs are built so you are able to deliver them more than once (e.g. train internal people to deliver instructor led training sessions, use e-learning videos, have guides for manager or peer-to-peer coaching sessions).

2. **Save cost by taking a modular approach to building learning journey:** Taking people through a learning and development journey requires production of material for training sessions, e-learning modules, executive presentations etc. While this material should of course be relevant to the specific time and situation the training participants are in, we need to be careful that all the material doesn't have to be updated and changed every time we run it, because there were too many references to something specific right now.

   Make sure your training modules are built to last at least for a few years to reduce constant need for additional investments.

3. **Consider including non-salespeople as sales training participants:** While sales training is primarily for those involved in selling and account management, bringing in people from marketing, for example, can be highly beneficial for all.

   Some of the most impactful "aha" moments we have witnessed in sales training sessions often stem from the dynamic interplay between sales and marketing. These moments frequently occur when marketers get exposed to how an effective sales conversation around value should be run, or when sales professionals discover the importance of emphasizing company capabilities in line with the overarching brand narrative, instead of only solely focusing on detailed product features.

   Make sure to encourage cross-departmental learning whenever possible within your training set-up.

4. **If you want to attend the training, make sure to be participating:** This consideration is mostly relevant for in person trainings, but it is important to keep in mind. We frequently encounter instances where managers, executives, or other sponsors express interest in joining classroom training sessions but with the understanding that;

   "*I'll just observe from the back.*"

   Despite their good intentions, this can create a stressful environment for people attending the training, as they may feel pressure to perform with their managers watching closely. This, unfortunately, is the opposite of an effective learning environment where people are not scared to try out new things or make mistakes.

   Make sure to create a safe learning environment and make it a principle for people who come to the training to be there as participants and not just as observers.

5. **Make the sales managers an integrated part of the learning journey:** Our final consideration is probably the most important one and the reason for why so many great training programs fail so greatly.

   A well-designed sales management cadence should include regular discussions between sales managers and sellers about the seller's development areas and focus skills for the upcoming period, based on field observations or self-assessments. A successful training program will use this cadence to reinforce newly acquired skills and regularly revisit them across teams.

   In some cases, the sales managers may need training themselves to effectively follow up on certain capabilities as part of the training program. Failure to engage sales managers will ultimately undermine the reinforcement of training, resulting in the loss of approx. 50% of the acquired learnings that must happen post-classroom.

   Make sure that your sales managers play an active role in reinforcing the learning journey by establishing or utilizing existing capability development schedules throughout the sales teams.

Any further questions? Reach out to

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