

# Transferring Sales Training...

## Optimizing the ROI of your Training Investments

Chris Jones is a vice-president of sales for a highly regarded national shopping centre developer and management company. At a recent sales training session, both Chris and one of the representatives posed the question: "So, what can we do to make sure we apply what we've learned back on the job?"

Back to Chris in a minute...

On an increasing basis, organizations are becoming more and more strategic with their training expenditures...thinking of them more like investments than costs. Human resource professionals and sales leaders alike are increasingly asking for the forecasted Return-on-Investment (ROI) of proposed training initiatives as part of their core decision-making criteria.

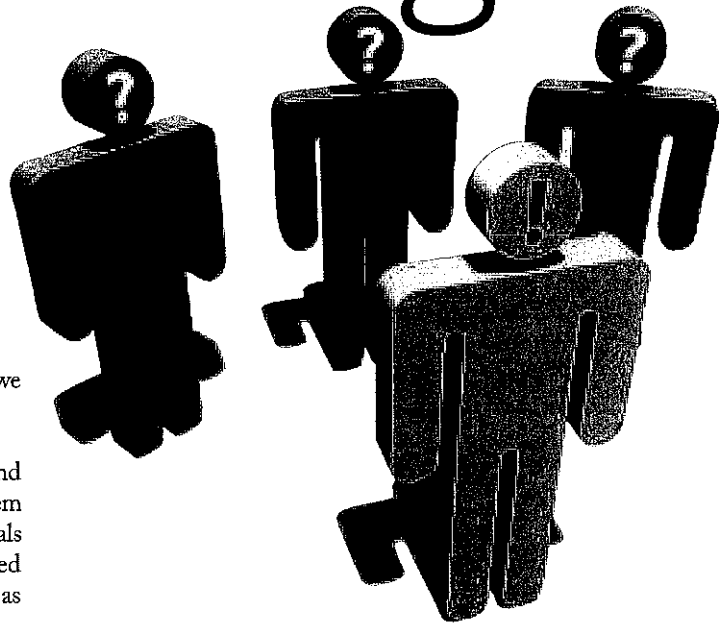
The challenge with ROI calculations is that it's very difficult to isolate the impact of training on business results, versus other factors such as marketplace dynamics, competitive activity, the general economy, interest rates and foreign exchange, and changing consumer behaviour (to name only a few contributory factors).

However, in virtually every situation, the reason businesses undertake sales and sales management training is to alter the behaviours of participants. Consider the old adage that it's irrational to expect improved results by continuing to do the same things over and over. Therefore, many performance improvement consultants argue that training is ultimately designed to help participants do things more, better, and/or differently on the job than they did before the training.

So...now let's get back to Chris and the sales team. In brief, we asked Chris who owned responsibility for ensuring participants applied what they'd learned when they return to the workplace. After careful thought, Chris admitted that the responsibility was shared equally between management and the participants. As a group, we discussed some of the science behind this topic.

A significant body of research exists covering how and why people transfer new learning to the workplace following training. In 2003 a new research project was conducted, resulting in a specific model and post-training strategies for optimizing the transfer of soft-skills training to the workplace.

First of all, it's important to recognize that when people return to the workplace, their application of new skills moves through an evolution of three primary phases (see sidebar).



Upon returning to work, participants begin **Experimenting** with their new skills, applying them imperfectly and selectively. Then, as they become more successful and capable in their application, they evolve in the **Competence** phase. Finally, once application becomes unconscious and refined, participants evolve to the **Mastery** phase, where they begin applying new skills more than 100% of the time, to new and novel applications/environments.

In addition to the phases of transfer, it's valuable to consider the blend between a participant's *willingness* and *capability* to apply their new skills.

During Phase 1, participants must exercise a significant degree of will in applying their new skills, since they have yet to hone their capability and are likely still unsure about the effectiveness of their new skills. Keep in mind that humans tend to resist change, especially when it comes to new interpersonal skills.

During Phase 2, participants have typically "bought in" to the value of their new skills, so the degree of will required to continue transferring those skills diminishes. At this stage, the participant must begin working more on their capability to transfer the skills, through practice and repetition.

Lastly, once Mastery (Phase 3) has been achieved, the degree of will required is very low. Participants are now advocates and maybe coaches for the skills they've learned. Therefore, a much greater emphasis on capability development is required to continue improving the transfer of the new skills.

This sensitive balance between willingness and capability can be layered on top of the transfer phases to create the Phased Transfer

# HUMAN RESOURCES

Evolution (PTE) model in the sidebar.

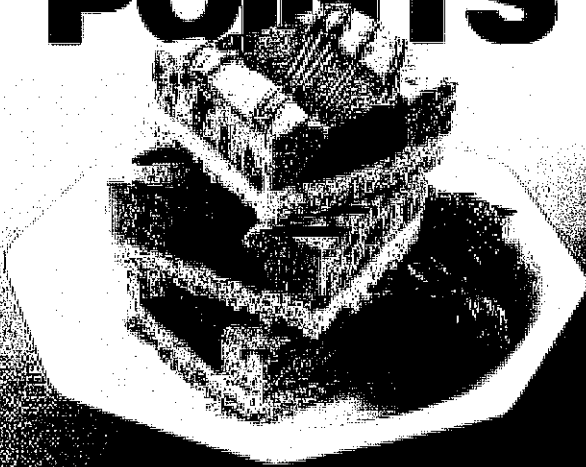
So what? What's the relevance of this research and the PTE model to sales leaders and representatives? Ultimately, the PTE model illustrates what happens with participants as they return to the workplace following sales or sales management

training. More importantly, we can now identify specific coaching and support strategies that can be employed following training in order to support and facilitate the transfer evolution.

The exhibit below illustrates how 25 specific post-training strategies can be leveraged

throughout the different phases of transfer. The strategies required in Phase 1 focus primarily on enhancing the will or desire of participants to apply their new skills. As we evolve through the phases, we see an increasing emphasis on honing the capability of the participant in applying their new skills.

## GET MAJOR BROWNIE POINTS



Get brownie points – and brownies – with M&M Gift Cards!

How? Here are the sweet details:

### Step 1

Register at [www.MMMeatShopsGiftCard.com/contact](http://www.MMMeatShopsGiftCard.com/contact) and you'll be entered to WIN Free Dessert\* for a year.

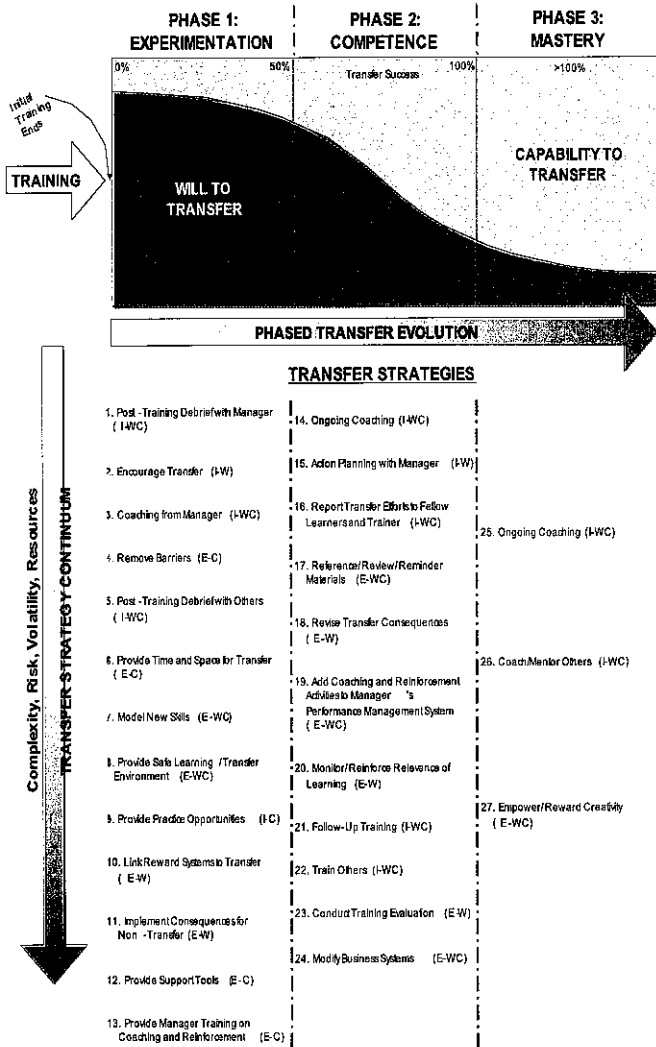
### Step 2

Order \$500 or more (on Gift Card denominations of \$25 or higher) for your incentive or holiday program and receive an amazing 5% discount.

They'll love the M&M Gift Cards and the year-long treats (if you decide to share) and you'll love all the brownie points you'll get for being the brains behind it all. Everyone wins!



\*Winner will receive \$1000 in M&M Gift Cards to be used towards the purchase of M&M desserts and other delicious M&M products. Registration must be received between Sept. 17 and Nov. 30, 2007 to be eligible for entry into contest.



### Phased Transfer Strategies (PTS) Model

The model combines the Phased Transfer Evolution (PTE) model in Exhibit 2 with 27 practical management strategies within the resulting framework. It illustrates how those strategies apply to each phase of transfer. Each item is also coded, based on whether it addresses Individual or Environmental issues (E or I), and whether it targets the Will or Capability of the learner in their effort to transfer (W or C).

Now back to Chris and the team. The next question they asked was, "How do we choose which of the 27 strategies to employ?"

The answer is dependent upon the blend between four factors: complexity, risk, volatility, and resources. For example, the more strategies employed, the more costly the solution. The more critical it is for participants to employ the new skills, the more strategies the organization may want to employ.

So, with Chris we agreed that the ideal approach was to employ the following four strategies immediately following training:

- Participants will complete a learning contract, identifying specifically what they will stop, start, and continue doing based on their learning in the program.
- Each participant will have a debriefing session with their manager, where they will explain their planned behavioural changes, and invite coaching/accountability from their managers.
- Participants will be provided with a discretionary bonus for their application of new skills over the next six months, determined in conjunction with their manager.
- Everyone will participate in a monthly team “coaching and practice” session, where they role-play and practice their application of the new skills, and share success stories and in-field challenges

with their application.

In summary, now Chris and the team are all committed to a series of post-training strategies to help them, “...make sure we apply what we’ve learned back on the job.”

David Batchelor, M.A., CSP, is a highly regarded sales force consultant and the vice-president of sales and solutions for Drake International, an international human capital performance improvement firm. He is associate faculty in the graduate school at Royal Roads University, and has an extensive list of publications. David is the author/co-author of the CPSA’s acclaimed Skills for Sales Success series of books/programs. He can be reached at david@allaze.com or dbatchelor@na.drakeintl.com or 905-409-7663.

## >>Evaluating Sales Training Success

Jack Phillips (1998) and other researchers suggest that we can evaluate the effectiveness of training on five levels:

- Reaction and Planned Action
- Retention
- Application (Transfer)
- Business Impact
- Return-On-Investment (ROI)

The last two levels are difficult to evaluate, because it’s challenging to isolate the impact of training on business results versus any number of other factors. Moreover, it could be argued that the single biggest reason for conducting sales or sales management training may be to change behaviours.

Therefore, the Ten-I Staged Evaluation Model (Batchelor, 2004) was published to help organizations prioritize their evaluation efforts given the cost and complexity of those evaluations.

We start by measuring the Impressions & Intentions of participants coming out of the intervention. Clearly, this information is valuable in evaluating success. Then, we determine if participants are Implementing and Integrating what they’ve learned. If

so, then obviously they have Internalized the learning, and we can then move on to determine the business Impact. Keep in mind that this ultimately requires a significant amount of effort to Isolate and Investigate the impact of the training versus other business factors.

Now, if Implementation and Integration has not occurred, then we must determine how many of the learners have Internalized or “retained” the learning in the first place. If not, then remedial efforts are needed. If they have Internalized the learning, then there’s something else holding them back from Implementing and Integrating what they’ve learned.

This new view to evaluating training, places a much higher initial emphasis on the transfer of

training to the workplace, versus a focus on ROI and business Impact alone.

