

# Field Sales Case Study

## **Summary of Project**

We met with the Group training and Development Manager of a National Heating and Plumbing Distributor Company to discuss a proposal for the writing and delivery of a series of sales modules for a new Sales Programme.

Their old sales course was a 4-day one that incorporated selling skills and financial knowledge. It was repetitive, not very interactive with limited exercises and some out-of-date material. There was also no proper tutor brief, therefore inconsistency of delivery, by a mixture of skilled and unskilled trainers.

Our contact had already done a mini Training Needs Analysis (TNA) and presented me with her findings. Consequently our proposal addressed these issues plus the findings from our own TNA. It was important to get buy in from various departments so we spoke to all the stakeholders to explain that we needed to get all departments to work together and to get their input plus all the correct up-to-date forms and processes. Our aims were to instil an excellent Customer Service ethic with a "Do it Right First Time" approach.

We always evaluate our courses using Kirkpatrick's model for delegate reaction and also where possible for learning gain. For the Basic Selling Skills module we provided a tick sheet that could be used by Line Managers to evaluate the third level, behavioural change in the workplace.

We then submitted a proposal for a new programme consisting of two 1-day courses and one of 3 days duration. We were successful with the proposal and acquired the contract for the design and delivery of 3 modules to be provided twice a year:

- Raising Commercial Awareness – 1 day
- Basic Selling Skills – 3 days
- Account Management – 1 day

There would be a gap of 3-4 weeks between each module to allow the delegates to assimilate their learning and try out the new skills in their day jobs.

**If you want more detail please read the full case study that follows.**

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## ***Identification and analysis of needs and problems***

We needed to understand the types of customers that the four different companies within the Group encountered. (The Group are a major national company within the plumbing and heating industry). So we went out on sales calls with Sales Representatives from two of the companies within the group. This Training Needs Analysis (TNA) enabled us to get a feel for what the sales force encountered on a day-to-day basis.

## ***Formulation of solutions***

Managing the relationship with the training department was vital to this project but it also required the buy in from the sales force, finance departments and the operating branches. The Group Training and Development Manager were our main contact and she we copied her in on any e-mails and/or meetings with other group members. The feedback on the previous course had been quite negative so we wanted this to be an immediate success with all parties involved. If it was successful there would be future modules that could be developed for the programme over the next few years.

The new modules needed to be relevant to the roles and the different business units. Some of the materials were "dry", such as finance so a way of making them fun whilst retaining the seriousness of the topic was important. All this should increase motivation and enjoyment of the roles as many of the sales force had been in their roles for a while.

Some of the modules could be taken out to the various regions and the Raising Commercial Awareness course was to be eventually delivered by internal staff. The two one-day modules would reduce costs as overnight stays would not be required, however the 3-day selling skills course would be residential at a hotel close to the head office.

There was one further module that was to be written by the Group Training and Development Manager – Knowing Yourself. We were to have no immediate input to this course.

We broke down the skills and knowledge, as identified by the various TNAs that were initially required within the sales roles. Our solution was 3 courses: 1-day Raising Commercial Awareness module, 1-day Account Management module and a 3-day basic selling skills module. These modules were to be offered over a 3-month period, twice a year to begin with.

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