



**RICHARDSON
SALES
PERFORMANCE**

Growth, simplified

A Guide to Measuring Sales Training Effectiveness

A RICHARDSON SALES PERFORMANCE EBOOK



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01 Why Bother to Measure Sales Training?

We measure almost everything in our lives. Starting at birth, a baby's height, weight, and length are measured. Parents count fingers and toes. They count age by weeks and months and, finally, years. In school, learning is measured by written tests and fitness levels by activity tests.

In sports, we keep score and statistics. Moneyball analysis has become a widely used strategy in evaluating baseball players. When we travel, we measure distance traveled and time to destination using maps and GPS. We wear Fitbits, keep food diaries, and use apps to track calorie intake. The point is that we track just about everything. Measurement is an integral part of our lives. How can it not be an element of sales training (especially when so much is at stake, considering both dollars spent and the potential for performance improvement)?

TrainingIndustry.com reported that, for 2013, the most recent numbers published, companies in North America spent approximately \$142 billion dollars on training; globally, the investment in training was approximately \$307 billion.

These are significant numbers. So, when someone asks me why they should have a measurement strategy, my short answer is, "Why wouldn't you?" How could any organization not grab the opportunity to measure progress made, or the lack of results, when committing big dollars to training their people?

To start, and before implementing any training program, you need a baseline. This helps to establish where you're at now and to make sure that you get to your ultimate destination, with all employees improving their skills and adopting the desired behaviors.

Consider this truism: what gets measured gets done. Measurement shines a light on what is important. Just knowing that management is observing, monitoring, or assessing behavior will change it. Measurement provides an additional value to the learning for individuals; they know that proficiency matters.

Again, let's look at recent data. TrainingIndustry.com studied strategies for sustaining the impact of sales training:

Organizations that were "ineffective" or "somewhat effective" at sustainment put nearly half of their budget into delivery of the training, at 46%. The other half was split between planning, at 27%; evaluation 14%; and sustainment, 13%.

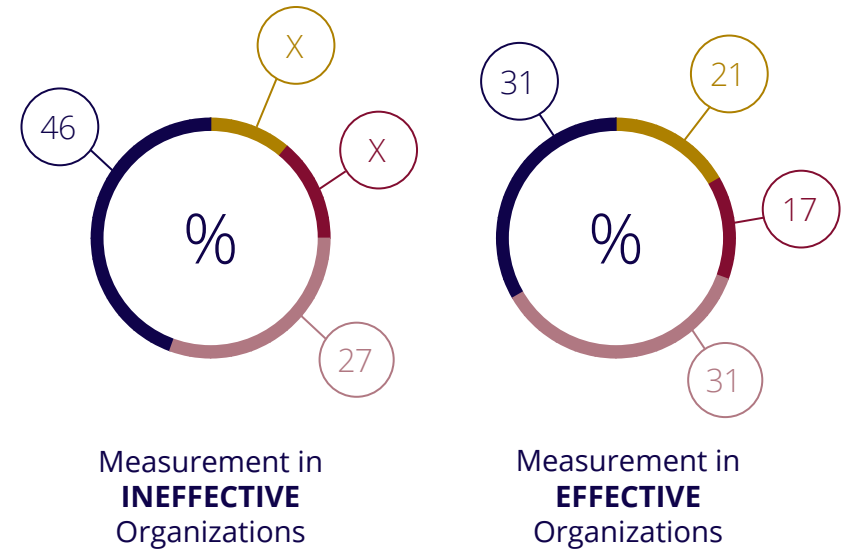
Organizations that were "effective" or "very effective" at sustainment allocated their funds differently. Delivery of training consumed just 31% of budget. Planning was another 31%. That left more than a third of the budget for evaluation, at 17%, and sustainment, at 21%.

What these numbers reveal is a serious misperception among the first group of companies — that delivery of training is the most important part of the learning process. Maybe these companies decide not to focus as much on measurement because they know (or fear) that, one month after training, the majority of what was taught may be forgotten.

What we at Richardson Sales Performance know about learning and adoption of knowledge and behavior change is that training will not stick unless it's put into practice immediately, reinforced regularly, and made part of the daily routine.

True change and transformation take a thoughtful approach, discipline, buy-in, and a regular cadence of communication and training reinforcement to achieve results. ■

How will you know you've achieved this desired state unless you measure?



02 Order Matters — the Sequence of Measurement

Now that the importance of measurement has been established, it's vital to adopt the proper measurement sequence to have the greatest impact on performance.

Measurement is not a one-and-done prospect. The standard pre- and post-test approach isn't sufficient to achieve lasting change.

The Kirkpatrick Four-level Training Evaluation model has become a cornerstone in the learning industry, looking at reaction, learning, behavior, and results. These traditional measures are familiar and necessary, but they're not sufficient. At Richardson Sales Performance, we build on the Kirkpatrick model by identifying additional factors that come into play.

Before training individuals, we want to know their natural talents and skills. There's an important difference between the two. Talent refers to an individual's aptitude and motivation. Talent is a part of their DNA because people can be great at jobs that are a good fit. The other side of that coin is that while a poor fit can be workable, it's not optimal. It's hard to be passionate about a job that doesn't play to a person's talents.

The other element involves skills. This is the "how" of doing something. Skills can be observed. If there was a video camera taping a client meeting, what would the camera see?

Talent should be assessed as a foundational element, both in pre-hiring, as well as pre-training. Assessing skills is the next step to set a baseline to measure against.

These two elements, assessing talent and skills, should come before training. After training, we move on to assess the four Kirkpatrick levels but with a few twists to gain a more complete perspective.

01 REACTION

This is more than the typical participant feedback (How did you like the class? How would you rate the instructor?). We want to know if the content was relevant and applicable. Do participants see themselves changing behavior? What is their confidence level that they will use what they learn? What is their plan when they get back to the office? We also want feedback from the instructor. Are they seeing early indications of adoption and behavior change?

02 KNOWLEDGE RETENTION

This is about more than passing a test. It's about arresting the forgetting curve, which is the first step to sustainment. We measure how well participants retain knowledge in the immediate three-to-four months following training, and we provide them with feedback throughout the process to reinforce learning. Measurement has to be part of the learning journey, and people need to know how they're doing along the way.

03 BEHAVIOR CHANGE

It takes about six months to achieve a consistent change in behavior. We take a multi-faceted approach to measuring this change. It can be self-reported by the individual ("When a client objects to a solution that I have offered, I typically ..."). It can be observations from the individual's manager ("When a client raises an objection, this sales professional acknowledges the objection and asks an open-ended question to better understand the client's need driving that objection.") Or, it can be feedback from customers ("When I express concerns, this person acknowledges my issues and asks questions to better understand my needs.") Of course, it is best if these results are compared to baseline measurements or observations of these same behaviors prior to the training.

04 BUSINESS IMPACT

At this level, it's important to consider three elements: 1) the consistent application of the knowledge and skills gained; 2) the actual change in the business metrics (revenue, volume, goal attainment, etc.); and 3) the extent to which the change can be attributed to the application



efficiency and activity level is merely capturing “doables.” More meaningful measurement comes from focusing on “deliverables;” that is, the outcomes that serve the company’s strategy.

When you incorporate measurement into your sales training strategy, using the proper sequence, you can gain insights and confidence about the ability of your team to deliver on its accountabilities. And, that will always be more meaningful than measuring what the team does on the job. It’s a matter of activity vs. business impact. ■

of the new knowledge and skills. It can also be helpful to determine what barriers or obstacles may be inhibiting potential improvement, such as competing organizational priorities, market influences, or the lack of management support. It’s more than whether the individual is achieving his/ her goals and seeing an improvement over time. The question is: to what extent did his/her learning influence

what he/she is doing now and is that making a difference in results? These should be tied to the company’s performance scorecard or other regularly tracked metrics.*

According to author and expert on HR strategy Mark Huselid, a measurement strategy that focuses just on

03 Five Guiding Principles for your Measurement Strategy

At this point, you should be ready to establish your own measurement strategy. But first, I'll share five guiding principles to help you through the process.

01 START WHERE YOU WANT TO END

When you start with the end in mind, your measurement plan will be more likely to address those things that matter most to your business. You will be aligned with the outcome that you are trying to achieve. If you identify best practices and then establish current performance as a baseline, you can see where opportunities for improvement exist and track changes along the way.

02 FEEDBACK IS A GIFT

Giving feedback to the individual going through training should be part of the learning journey. For everything that is measured, make sure the individual has the opportunity to see his/her results and be a part of an ongoing developmental dialogue. Put the individual in charge of his/her learning, and help him/her understand how to use that information to guide his/her continuous learning. When he/she expects and gets feedbacks, there is more engagement and compliance.

03 METHODOLOGY MATTERS

It is best to measure performance in a way that aligns with direct experience. In sales training, it's about client situations and how people behave with clients. And, when you anchor measurement to the best practices that people should be exhibiting, it reinforces the behavior that you're trying to achieve. At Richardson Sales Performance, best practices tend to focus on strategy rather than tactics; they're focused on the customer rather than the sales professional; and, they advocate question-led dialogue over just telling someone the solution.

04 USE THE RIGHT TOOLS AT THE RIGHT TIME

For people in the field, tools need to be mobile, and the time that it takes to complete the measurement task needs to be minimal. At Richardson Sales Performance, mobile-based skills testing takes less than a half-hour.

We also have a mobile, knowledge-retention tool that takes only five minutes every other day, presenting a question, multiple-choice answer, response, and

explanation. When we conduct impact surveys, there are a maximum of 12 questions. We also make sure to incorporate these measurement and feedback mechanisms into their everyday lives.

"There was an existing business situation (approximately \$10 million annual revenues) that recently took over as the new account manager. I've been using the questioning, positioning, and checking skills learned in class, and this has been successful for me. The latest NPS score is a 9 "Promoter," with "Good Support" as the reason for recommending us."

05 BLEND DATA WITH STORIES

Use both quantitative and qualitative measures to see the big picture on measurement. Statistics will not be enough. Make sure to also capture stories and observations, and then blend these with the numbers. Consider how much more effective the following two scenarios are when context is added and told as feedback from training participants:

"I improved my listening skills and let the client talk more. As a result, I won a more than \$700,000 sale with a major utility. I have been working on negating a bad habit of interrupting the client during his/her "This is what I want" speech."

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With these **PRINCIPLES** and the sequence of measurement, you should be well on your way to implementing a measurement strategy before training even starts. And, Richardson Sales Performance is always here to help you get started. ■





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Learn more about how Richardson Sales Performance can help your sales organization drive results with virtual selling skills, contact us today. Follow us on [LinkedIn](#) for more insights on effective selling.

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