



Sales Learning Solutions: Identifying Needs and Capabilities

For b-to-b sales professionals, finding time for learning is a struggle despite an acknowledged need for long-term development

In a quest to balance learning needs and maximize selling time, sales enablement often depends on technology to impart knowledge and develop skills

To select the right learning platform, sales enablement must identify the core capabilities needed to effectively create, deliver and manage learning content and tools

In medieval times, workers who specialized in individual crafts – e.g. masonry, carpentry, glass blowing, weaving – often formed guilds or associations. Through this system, more experienced guild members shared their skills, as well as their trade secrets, with apprentices, who paid it forward to successive generations of craftspeople. In this way, knowledge and skills were preserved over the centuries.

A key mission of b-to-b sales enablement is to propagate the knowledge, skills and art of selling to successive generations of sales reps. Sales enablement practitioners must find a way to effectively train reps who are laser-focused on closing deals, and generate measurable ROI for organizations that are leery of allowing their front-line contributors to participate in non-selling activities. In this brief, we describe requirements for a successful sales learning environment.

Core Capabilities for Sales Learning Solutions

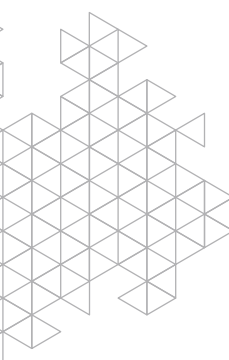
Dozens of technology providers specialize in the sales learning space, and the market is converging as related platforms (e.g. sales asset management [SAM] offerings) are introduced. New providers and innovative solutions are flooding the market with technology-enabled learning options that promise faster, more consistent quota attainment. In this environment, it is easy to lose sight of what is most important when choosing any technology: defining overall needs and capabilities to avoid assembling a mismatched and inefficient stack, which creates redundancy or completely overlooks critical processes that require automation. To help sales enablement organizations assess learning options, we have defined the core capabilities of a best-in-class learning solution:

- **Learning content creation.** Many enablement functions are chartered with creating assets to address learning requirements specific to an audience in formats that promote maximum engagement, understanding and retention. Content creation tends to fall into two categories: in-depth foundational learning and just-in-time learning and tools that are used in the context of a sales rep's daily workflow. Common examples of created learning content include voice-over narrations for dynamic content, live-action videos and interactive checklists. Just-in-time learning typically is presented as micro- or nano-learning, which can be as low-tech as a reference sheet or as sophisticated as an interactive video.
- **Learning content management.** Whether the learning content is created by sales enablement or curated from other sources, the organization



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must provide controlled access to learning artifacts and tools to learners, administrators, creators, editors, subject matter experts and managers. It also must facilitate learning asset approval workflow, access, usage, updates and decommissions. Effective content management employs various feedback mechanisms to consistently monitor how best to adapt content delivery to behavioral patterns and to track usage by high-performing reps, including learning tools and assets directly associated with successfully closed deals (see the webcast “Sales Content: What Winners Do Differently”). One example is the ability to assemble multiple types of content mapped to roles into anything from a simple learning bundle to an extensive development program delivered within sales plays and at a rep’s point of need. When this delivery occurs within the platforms most used by reps for their daily work (e.g. sales force automation or SAM interfaces), the opportunity to drive deal-specific, effective sales learning increases.

- **Learning engagement management.** Unless this responsibility is handled by a separate HR or central training function, sales enablement needs to schedule, track and integrate data on engagement and/or attendance in learning opportunities. Promoting, tracking and managing learning engagement often occurs across a variety of delivery methods, including e-learning, self-paced reading, classroom, webinar, role-play and live feedback scenarios. This capability is traditionally delivered by a learning management system (LMS), but many sales-specific platforms can provide some of the same functionality or integrate with an LMS as the ultimate source of record.
 - **Certification and testing.** To objectively evaluate competency, sales enablement organizations need environments for testing knowledge and skills through Q&A, role-plays and/or recording observations on live interactions. Effective certification includes three levels of testing: knowledge of the content; ability to apply what was learned through role-plays or teach-back scenarios; and effective demonstration of proficiency in a real-life buyer-facing environment. These criteria apply to foundational knowledge as well as selling skills (see the brief “Certifying the Sales Force: Best Practices and Benefits”). Examples of common certification tactics include deploying tests – handwritten and via e-learning – as well as scenario-based scored role-plays conducted live or via video, and automated scorecards that capture feedback during manager ride-along days.
 - **Gamification of learning activities.** Create incentives for learning by ranking participants on various attributes (e.g. participation, completion, quality of response) to create competition and reward desired behavior. The sales organization may use this tactic to motivate selling and learning behaviors, leveraging the sellers’ sense of competition and desire for recognition to promote successful knowledge transfer and revenue results. For example, game mechanics can be used for quick hits (e.g. a new product launch) or embedded in larger programs (e.g. new hire onboarding).
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- **Interactive learning reinforcement.** To mitigate the significant loss of knowledge that occurs within days of a learning event, promote and test retention over time through staged learning, in addition to the observation and practice of desired skills or behaviors. Effective reinforcement techniques are essential to long-term sales performance. Experienced adult educators know that simply resending learning content and reminding staffers of its importance is ineffective, particularly with sales reps for whom time is money. Deploying reinforcement techniques that make learning easy, accessible, enjoyable and relevant increases the likelihood of knowledge retention and behavior modification. For example, continue to deliver and test knowledge in “bite-sized” chunks that expand and elaborate on more extensive foundational learning, or challenge reps to respond to a customer scenario via video with previously learned messaging or techniques.

The Sirius Decision

The old refrain of “If I’m hitting quota, why should I be bothered?” is quickly being replaced with the Millennial cry of “How are you going to make me successful?” Organizations dedicated to competency and continuous improvement cannot focus only on accelerating sales reps’ knowledge and skills – they also must address revenue and commissions. Fully assessing and understanding needs and associated capabilities is the first step in determining how technology can help accelerate growth and drive consistent and repeatable quota attainment. These elements can be used to articulate requirements and pinpoint potential technology partners.

