

Global Communications Solutions & Services Company: Learning & Development Programme for Senior Sales Professionals

Summary case study of the ROI Institute methodology in use for the programme evaluation

In 2004 a Global Communications Solutions & Services company set itself ambitious Information Communications Technology (ICT) revenue targets, which meant it needed to address consultative selling methods at the highest level in client organisations, leading to the sale of transformational Digital Network Economy (DNE) solutions. To achieve this, sales professionals would need to understand their clients' strategy, think solution rather than product, engage in board level conversations and operate consistently at chief officer level. After thorough needs assessment, a number of Learning & Development (L&D) programmes were developed to move the company's sales teams towards consultative and ultimately partnership selling.

One programme was designed expressly for the senior sales professionals' community. Two five-day modules delivered by a leading business school were separated by three months, when the participants worked individually with the school's tutors and in virtual teams to develop and implement strategic account plans and personal development plans. The themes taught by the training partner included strategic vision, partnership development, commercial acumen, leadership and political intrapreneurship.

Four groups completed the senior professionals' programme; ROI evaluation at levels 1 to 5 was carried out on the first group of 20 participants. Level 1 (reaction and planned action) evaluation was based on the answers to such questions as, "this training was a worthwhile investment in my development" "this training was a worthwhile investment for my employer" and "I will be able to apply the skills and knowledge learned in this course to my job". A minority of negative responses were followed up and revealed flaws in the criteria for selecting participants. The criteria was changed, with positive impact on the Level 1 results for later programmes. Level 4 (business impact) evaluation was measured against the increase in revenue generated by participants over the 12 months following the training.

The programme gave the participants the means to operate at the highest level in client organisations. Although they had to balance their short-term revenue targets with planning for the long term, the intended results came through over the next twelve months.

After deduction of cost of sales, the incremental gross profit generated by the 20 participants was calculated to be over £4 million, of which the consensus was that 28% could be attributed to the development programme for senior sales professionals. Programme costs amounted to just over £400K, the end result securing the company a ROI of 171%.

The case study includes thoughtful analysis of how the company could further improve return on investment in L&D and has led to important changes and recommendations. For example:

The case study proposed that line management be required to fully support the programme, creating the working environment for the participants to apply the skills, learning & development that they have been taught. The case study also advised that line management should be expected to coach the participants during the crucial intermodular and post programme periods. These proposals have been addressed within the development programme for line management, which is still being delivered with positive results.

A customised 360 degree feedback process was proposed—linking the questions to the competencies needed by senior sales professionals, and making inputs from customers mandatory. The 360 specific to senior sales professionals was introduced during Programmes 3 and 4. The information gathered proved invaluable to both the participants and the training partner tutors and was reflected in excellent feedback captured during Level 1 evaluation. The new 360 also contributed towards the capture of Level 2 (Learning) and Level 3 (Application & Implementation) evidence, permitting a correlation of competencies to future business metrics.

This case was prepared to serve as a basis for discussion rather than to illustrate either effective or ineffective administrative and management practices. All names, places and organisations have been disguised at the request of the organisation.