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Best Methods for Product-Based Training

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When it comes to launching a new product, the learning function should do more than develop training. It should be involved in strategic planning from the very beginning.

As soon as the salesperson initiates conversation with a potential customer, the clock starts ticking. The representative has seconds to capture the customer's attention and interest. In a competitive environment such as this, salespeople try to distinguish their products in a world of choices, while working within the constraints of time.

To make a successful sale, the rep not only needs to have excellent selling skills, but also needs to know the product inside and out. One of the most effective ways to obtain that depth of knowledge is through training. But how do you train a sales force that is field based, geographically dispersed and time starved? The best way is through a blended learning initiative that reaches a sales force in the field, but also takes the time to bring the employees in for interactive, face-to-face training.

Sophisticated Training for Sophisticated Products

With complicated products, the training becomes more complex — not only because sales representatives have to understand the intricate nature of the product, but also because they need to understand how that product fits into the marketplace.

At Steelcase, an international office furniture manufacturer, a sale can take as long as 12 to 18 months. The company's 2,300 North American sales reps and distributors have to understand where the customer is in the buying process, how that aligns with the company's sales methodology and, eventually, the best product fit for that customer.

“Part of our process is understanding how the client is working,” said Ken Dutkiewicz, director of global learning and development for Steelcase University. “For instance, in a legal firm, you might have a situation where you have a lot of partners who are working in their own private offices. On the other hand, you go into a marketing firm, and you're probably looking at people who are working together. Putting them into private spaces would actually be counterproductive to the way they work. So we have to understand what's going on in the company, and our line has to be broad enough to be able to meet those various needs.”

Because of the sophistication of the sale — and, therefore, the learning — Steelcase has developed an internal system for categorizing training into the following levels: awareness, knowledge, understanding and skill. In the awareness stage, sales associates just need to know that an aspect of a product has changed. That takes place through an e-mail or a letter.

At a knowledge level, sales reps should be able to speak about the basic features of a product. In that instance, the training blend is a little more elaborate, so it will start with an e-mail, but that will be augmented by some sort of Web interaction or distance learning.

“Understanding means that [sales reps] can talk about [the product] and relate it to the needs that they’re hearing from the client,” Dutkiewicz said. “When we have to get somebody to that level, we want to see the performance of a person before they go in front of [the] client. Whenever we want to do that, that’s when we know we have to put a trainer or a human being in front of a class, and usually, that also tells us that this isn’t a one- or two-hour intervention.”

For employees to attain a level of skill, there has to be coaching and mentoring in an actual sales situation, as the classroom is still an artificial, simulated environment.

“Usually, when we want to bring things to skill, we build in a coaching element because that requires the salesperson’s manager to go out, watch the person do it in front of real people, give them immediate feedback and see that the things that we built in the classroom are actually being used in the real world,” Dutkiewicz said.

Creating a learning initiative in the pharmaceutical industry adds an entirely different element, as the product always needs to be reviewed and approved by the U.S. Food and Drug Administration before it hits the market. As a result, the training is on hold until the product is approved, forcing those in charge of learning to work within a condensed period of time, usually between three and six months, to develop a product-based training module for field-based employees.

“In the pharmaceutical industry, training departments tend to work at a very fast pace between the approval of a product by the FDA and, ultimately, the training of the field forces,” said Michael Capaldi, associate vice president of sales training and leadership development at pharmaceutical company sanofi-aventis U.S. “You do as much as you can leading up to the approval stage, but anything related to the product itself really has to wait until the label is approved before it can be developed [to meet legal requirements].”

Product-Based Training Is More Than the Product

Learning initiatives shouldn’t end at the product. They also should delve into the skills needed to sell and support that product. Unfortunately, most companies aren’t training sales reps on the skills, but instead are concentrating all of their efforts on the product itself, according to Nancy Stephens, president of international management consulting firm PI Worldwide.

“We always ask and talk with a client first about product knowledge,” she said. “Most companies that we interview tend to say that they feel that their folks are most equipped in [product knowledge]. The product knowledge is critical to the sales process and sales presentation, but it is not the only piece. Companies can do a fantastic job at product training, but if they’re not teaching the surrounding skills, they’re actually not completing what a sales rep needs.”

An enhanced learning initiative would cover product training in sync with sales training. Steelcase University does just that in its training programs.

“We don’t want to make our training all about product,” Dutkiewicz said. “Our training is about what the underlying customer needs are. If our people can understand that, then they can start applying our product in a way that will get the maximum for the client. If you do a great job of selling, if your skills are wonderful, you may need little product knowledge, but when you need product knowledge, it better be really good. If I get to the end of a process and a person wants me to say how this particular file is built, I better be able to tell them. Otherwise, I might lose the credibility that I’ve gained through my consultative process.”

Creating Effective Product-Based Training

Sanofi-aventis takes a modular approach in the initial phase of its training. After a product receives FDA approval, the sales staff is trained on anatomy and physiology, the disease associated with the product, the clinical trials and the approved labeling. These four training elements are considered the product foundation and are taught through distance learning.

While paper and online delivery are not as interactive as face-to-face training time, sanofi-aventis takes into account where its staff is, what is most accessible and where live instruction is best carried out. Because the staff is field based and doesn’t always have access to desktops throughout the day, sanofi-aventis has to give up some interactivity for flexibility in delivery.

But Capaldi said sanofi-aventis also includes live, instructor-led sessions in its training suite. Sales employees need the opportunity to interact with one another, simulate the sales process and receive feedback from their superiors. In the pharmaceutical industry, this is especially important, as sales reps are dealing with physicians, and the access to those customers is limited.

As a result, the company’s training program culminates in a national launch meeting where all sales professionals and their management come together.

“Generally speaking, in the pharmaceutical industry, most companies will launch their products and train at that launch in a live setting,” Capaldi explained. “Once you leave that launch meeting, where you get all the tools to sell the product, then people are able to go into the field and promote the new product to the customer. If you look at it in those two phases, there’s the modular approach on the front end, which tends to be more self-paced and distance based, and then building up to a launch meeting, which is more

application based and a simulation of what the sales professionals will actually do in front of the customer.”

The most successful product-based training aligns objectives with methodology, and has the following components: good instructor-led training, assessment, reinforcement through e-learning and d-learning and management support.

“I work with a lot of chief learning officers, and I’ve seen the best understand how to have the objective and the methodology work together,” Stephens explained. “For example, if it’s a product rollout and it’s going public in three months, they have a plan. We’re going to do a launch meeting, which is face-to-face, a month before. Two months before, there is going to be an e-learning module that everyone has to complete before they attend the launch meeting, and that’s going to be the foundational information on the product.”

The Marketing-Design-Sales Triangle

In sophisticated product-based training, the marketing, design and sales departments can’t be at odds. There has to be an open flow of communication between the groups, and they need to work cooperatively to create a plan for a product rollout, which in the end will help improve the training and result in a better return on investment.

“In an ideal world, those three work closely together,” Stephens said. “The worst-case scenario, which happens in lots of companies, [is when] research and design creates a product and throws it over to marketing, marketing creates messaging and throws it over the fence to sales and sales says, ‘This doesn’t make sense.’ You have this fabulous product that then has a mediocre acceptance by the marketplace because those three didn’t work together. There’s a very expensive cost to not working together, but it’s common because we have different roles and we have busy people. It’s understandable why it occurs, but it’s not acceptable.”

At Steelcase, the communication between departments is essential to developing a successful launch with a great product, messaging, distribution and training, and that communication has to start early, Dutkiewicz said.

“We want to be in the planning meetings with our sales leadership, marketing leadership or distribution leadership because if we understand what they’re trying to accomplish in the market, we can help them build the training that they need to make their plans come true,” he explained. “The last thing you want to have happen is us find out a couple of months before something’s coming to market [that] somebody thinks they need training for it. It’s difficult to build the right training and get it implemented, so we have to have early visibility in order to be successful, and visibility equates to communication.”

Blended Learning

In creating a product-based training solution, companies should include a variety of modalities. There has to be a blend of methodologies. Sanofi-aventis does this by using d-learning modules for about 70 percent of its training. The other 30 percent is live training.

“To me, it’s about maintaining that delicate balance. Any one method, if that’s the only method that you utilize, you’re limited,” Capaldi said. “In other words, if it’s all to be delivered via instructor-led training or it’s all to be delivered via online, you’re missing the opportunity to raise the level of effectiveness. Giving people the foundational materials and pacing the learning associated with that material, that’s a great way to use distance learning and e-learning.

“However, when you get to the actual behavior associated with what you’re going to do with the product knowledge in front of the customer, to me, that’s just difficult to replicate in distance or in an online fashion — as well as the shared learning that occurs from having other learners around you. Even if you have budget constraints, there is always a way to bring together the learners so that they can participate together in that latter component.”

No matter what changes happen in the industry, there will always be a place for instructor-led training, as a sales staff needs the interaction, simulation and feedback that occurs only in a face-to-face setting.

“For example, we could put everybody on a plane and spend X amount of money, or we could keep them where they are and give them log-in information,” Stephens said. “[Virtual learning] looks easier, cheaper and better, but if you put all your eggs in one basket and assume that’s the way adults learn, you just shot yourself in the foot. A lot of companies have tried a variety of things, and they end up with some blended learning combination that has occurred through realizing what works in our environment, what works for our products and what works for our people. There is not one perfect answer.”

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