

# Selecting a Sales Training Provider

Questions to Consider to Find the Right Partner



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## ABOUT THE AUTHOR

Debbi Conger is an instructional design expert who previously worked as a training manager for Microsoft for several years. Besides managing a design and delivery team for the worldwide new hire field sales onboarding program, she also hired several sales enablement companies and managed a million-dollar training budget. This whitepaper is based on her years of experience in learning what works and what doesn't when selecting a sales training provider.

## ABSTRACT

Once a company has identified the need for sales training, the next step is to navigate through the myriad options that are available. When making a sales training investment, you need to be more systematic in your selection process than just selecting a company that seems to be easy to work with. This white paper offers expert advice to help ensure that you choose the right sales training partner for your organization.

## 16 QUESTIONS TO CONSIDER

The following is a list of questions to consider before making an investment in a sales training program:

### 1) HOW HAVE YOU DEFINED THE NEED?

Did a company leader define the need? "We need training! No one tells our story consistently!" Or did the sales manager ask you to help reverse a decline in sales? If so, do a needs analysis to see if training is the answer or if another intervention would be just as cost effective or more so. The intervention you need could be as simple as a job aid or a video showing how to tell the company story.

After defining the need, get your stakeholders to determine how to measure the difference the training made. That way you can plan to make key improvements and collect the data to calculate your return on investment. To do this, you must first make a baseline measurement. You must also specify the results you expect and when you expect them.

### 2) SHOULD YOU BUILD OR BUY?

If you have the capability and the time, you may be better off developing the sales training yourself. After all, you know your company and its business better than any outside provider ever could. That being said, you should be realistic about the time investment required to develop a high-quality, well-documented sales training program. It's not uncommon for a comprehensive training program to require hundreds of hours of development time.

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If you decide you want to hire a provider, investigate whether they have an existing course that could meet your needs well enough to be used off the shelf. And if you decide to use an off-the-shelf course, ask yourself if you want to invest in customization so that the terminology, processes, examples, and customer scenarios resonate with your target audience.

You may not need complete customization, but you do need to work with a company that can learn enough about your products, your sales team, and your sales cycle to speak to your sales team in the language that matters to them. The kiss of death for sales training is being too generic – for example, the sales team gets trained on how to sell widgets, not their product or service.

If you have ever trained sales reps, you know that they always ask “What’s in it for me?” If reps can’t see that the training will help them sell better and make more money, they will immediately disengage from it. The best way to keep them engaged is to ensure that the sales training content meets them at the right level. The training must also address their challenges, customers, and selling situations. This approach to customization for relevance pays off when the training is applied on the job.

### 3) HAVE MEMBERS OF THE TRAINING PROVIDER’S TEAM EVER CARRIED A BAG?

If the provider doesn’t have actual sales experience, they are unlikely to understand your needs and be able to fill them well. As a result, the training will fall flat with the reps because they will realize that the training doesn’t “get” them.

### 4) HAS THE TRAINING PROVIDER DELIVERED SUCCESSFUL SALES TRAINING IN THE PAST?

Do your research, and ask for customer references. Getting quantifiable results is often a challenge because most training clients don’t collect data before or after the training. But you can ask references for anecdotal evidence of the training’s effectiveness or ineffectiveness. Also ask how the provider helped them design the training implementation, which is crucial to the training’s success.

**Suggestion:** When looking for references, don’t get locked into considering references only from companies in your industry. Seek references from companies that have a similar business model.

### 5) SHOULD YOU LICENSE THE CONTENT?

For many sales organizations, licensing content from a sales training provider can be a highly cost-effective way of implementing a training program. If you want to use your own facilitators, you may need to license the content.

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## 6) WHAT FACILITATOR SUPPORT DOES THE PROVIDER OFFER?

If you do license content, will the provider offer train-the-trainer support? This consideration is important for successful implementation. In addition, does the provider include a detailed facilitator support guide that provides background on the content, additional guidance, and delivery advice?

## 7) DOES THE PROVIDER HAVE A REPLICABLE DEVELOPMENT PROCESS THAT ENSURES A PREDICTABLE SCHEDULE?

Ask which design and development process they use. A provider that has instructional designers on staff will be familiar with the ADDIE model, but many companies are moving to a SAM or a SCRUM model.

## 8) IS THE PROVIDER WILLING TO WORK THE WAY YOU WORK?

Many times you find a provider that looks good on paper but in practice has a very different work style and set of assumptions on how to collaborate than yours. The fit is just not there. This disconnect makes it more difficult to complete a successful project. And, even worse, you will be unhappy with the dynamic throughout the process!

Does your company culture include tightly defined work processes that predictably move most projects from point A to point B? Or does your company culture rely more on inspiration and creative problem-solving to maximize innovation?

The best approach is to find a provider that likes working the way you work. One way to identify a provider's culture is to analyze how they negotiate the terms of your agreement.

## 9) HOW CLOSE IS THE PROVIDER'S SALES PROCESS TO YOUR PROCESS?

Unless you want to spend significant time developing a sales process, find a provider that uses a sales process that aligns with how your customers buy. It doesn't matter if the sales process includes four, five, or six steps. The provider should be able to modify the names of the steps and either consolidate or expand the steps to allow you to use your sales force automation application and your pipeline management reporting process.

## 10) IS THE PROVIDER EXPERIENCED ENOUGH TO TAKE A CONSULTATIVE APPROACH?

You know your company's business, but this may be the first time you have developed a comprehensive sales training program. The sales training provider should have developed such programs many times and should offer you the benefit of what they have learned. So they should

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respectfully challenge you if you make a suggestion that they know from experience will hamper the training.

### 11) HOW SCALABLE DO YOU NEED THE PROVIDER'S SERVICES TO BE?

If you have an aggressive deadline (and who doesn't?), can the provider offer enough resources to develop the training in a parallel fashion? If you need training provided in multiple locations quickly, does the provider have trained, experienced facilitators who can accommodate your training schedule?

### 12) IS THE TRAINING DELIVERED OVER TIME, OR IS IT "ONE AND DONE"?

Spaced training fits the natural learning process. By spacing out the learning sessions, the reps get a chance to try the new skills then build on them with the skills taught in later sessions. Spaced training also prevents cognitive overload. No one is going to learn a new process in one afternoon.

If you opt for a one- or two-day workshop because all the reps have travelled to one location for a sales meeting, make sure that the sales training provider offers a reinforcement plan. This plan could include virtual reinforcement sessions or a sales manager's coaching guide aligned with the sales skills taught in the course.

Whatever training company you chose, be sure they can help you determine how training will be retained and reinforced.

### 13) IS THE TRAINING AVAILABLE IN MULTIPLE DELIVERY MODES?

Does the sales training provider offer the same content in instructor-led, virtual instructor-led and online? This range of choices allows to you be flexible in your delivery. If you have a highly distributed sales force and can't get everyone in the same room, virtual instructor-led training facilitated by an experienced virtual trainer may be the way to go. Do you want to train new hires within two weeks of onboarding? If so, you need online delivery to ramp-up the new rep quickly. And you can also use the online format for reinforcement. Some sales managers use an online topic to discuss a particular skill at a team meeting as part of their coaching plan. And many companies are choosing a mobile format to deliver training nuggets to sales reps where they live — on their phones or tablets.

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#### 14) HOW DOES THE TRAINING COMPANY EXPECT TO ENGAGE WITH THE SALES MANAGERS AND STAKEHOLDERS?

Besides offering a coaching guide or training reinforcement, does the provider include sales managers in their needs assessment or customization? Do they recommend that sales managers either take a special manager's course before the rep training or attend the training with their team? Does the company ask how you get buy-in from stakeholders and what the stakeholder review process will be? If so, this is a provider that wants to partner with you to make sure the training not only is a success but will help your sales teams improve results.

#### 15) DOES THE PROVIDER INCLUDE A POST-PROJECT ANALYSIS?

Analyzing how the project went with the sales training provider is always valuable. The purpose of the analysis is to document processes that worked well and decide what you would do differently in the next project.

Remember, sales training can be a significant investment, particularly when you consider related costs such as travel expenses and the opportunity cost of pulling your salespeople away from their revenue-generating activities. So it is imperative that you are prudent when selecting the right sales training provider for your sales organization.



## **About Sales Readiness Group**

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