

**White Paper:
Real Sales Success Delivered Virtually**



About The TAS Group (www.thetasgroup.com)

The TAS Group delivers improved sales effectiveness through our unique blend of sales technology and experience, resulting in 88% better quota achievement. Our industry-leading methodology has helped more than 650,000 sales professionals find and close more deals, and our proven sales process makes your forecast and pipelines accurate by putting science behind it. And because on-the-job training is the most effective way to learn, our virtual learning system is available to your sales team for daily use worldwide - reinforced by expert coaching. It all gets delivered through our Dealmaker technology - the on-demand application that enhances your existing CRM system to produce sustained results.

Dealmaker solves these problems:

- **My revenue performance falls short of potential.** We all know that a sales methodology can increase performance. The trick is getting it to be used in the first place, and getting it to stick for long-term performance. By adding our sales process science and Dealmaker software, methodology becomes an automated, daily-use activity for your sales team. It's guaranteed to help consistently create more opportunities and win more deals.
- **My forecast isn't accurate.** Does forecasting feel more like roulette than a business process? Our sales process science and Dealmaker software take the guesswork out of forecasting. Dealmaker removes the optimism that permeates sales people's assessments of where they are in the sales cycle, replacing it with objective in-depth analysis of your team's actual performance and knowledge of what it takes to close deals. The result is a more accurate forecast with early warning about problem areas for better coaching sooner.
- **Classroom training is expensive and doesn't produce sustainable results.** 87% of skills are lost within one month of traditional classroom sales training. Our Dealmaker Virtual Learning System trains remotely in small, bite-sized pieces that are perfect for modern on-the-job learning and dramatically improved absorption. Post-training, our Dealmaker software integrates with your CRM to offer on-demand training content at every step of the sales cycle to achieve daily reinforcement and long-term retention, supported by expert coaching.

Headquartered in Seattle, with international offices in the UK and Ireland, the TAS Group is the only sales effectiveness organization with a continuous multi-million dollar investment in its own methodology and technology R&D center.

The TAS Group also hosts and moderates The Sales 2.0 Network ('S20N'; www.sales20network.com), a global, virtual, thought-leadership forum to discuss issues relevant to sales professionals in a Web 2.0 world.

Real Sales Success Delivered Virtually

Introduction

A recent study by the Gartner Group, a leading research and advisory company, has shown that people overwhelmingly favor an on-the-job learning process over a time-consuming one or multi-day workshop. This preference is in part due to the almost 90% loss of knowledge and skills following a traditional classroom event. Add the increasingly high cost of travel and current financial instability in our budgets; it then quickly becomes clear that a more efficient learning method has to exist for companies to see a return on their training investment.

This White Paper discusses the importance of viewing sales effectiveness learning as a process rather than an event, and shows how the use of a technology platform like The TAS Group's DealMaker™ can not only enable sustained revenue and sales effectiveness improvements, but train and reinforce critical sales concepts, all without requiring large blocks of time or the high costs associated with travel.

As with any of our White Papers, there will be a big variance in the seniority and experience of the readership. Some of you will perhaps be in your first managerial role, looking to focus on what's really important in the deal. Others may be more seasoned sales leaders at Director, Managing Partner, or VP level tuning in to make sure you're in step with the latest thinking and technologies. This White Paper aims to provide something for the complete range of requirements, since the ideas and recommendations have applicability right up the leadership hierarchy. However, if you want to dig deeper or move wider, we urge you to get in touch with us individually. You can do this via email to: marketing@thetasgroup.com.

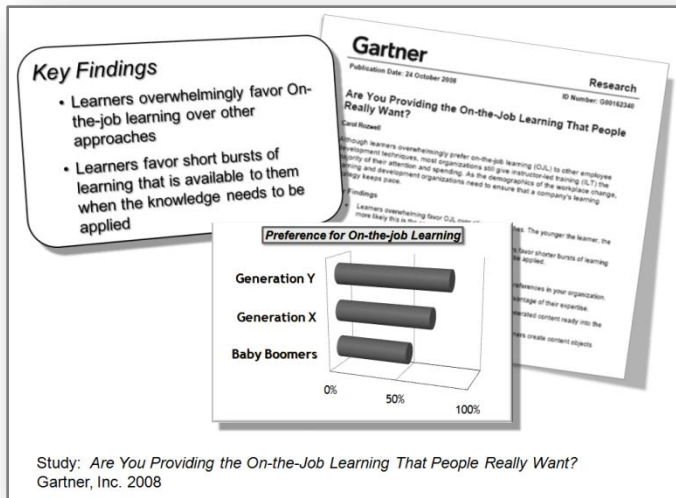
This White Paper will cover five main topics. First, we'll briefly look at traditional sales training and new insights into how people prefer to learn and retain skills and information. Then, we'll go over The TAS Sales Effectiveness Process, which was designed with these insights in mind. Next, we'll discuss how the DealMaker Virtual Learning System transfers knowledge remotely. After that, we'll look at how knowledge and newly acquired skills are applied to your specific sales-team's situation for greater retention. And finally, we'll discuss how you can measure your team's performance, apply solutions to problems, and identify where ongoing coaching is needed - all done virtually.

Sales Training and How People Learn

Traditional sales training is a cycle that goes something like this. A company finds a training provider, purchases a license for the material, pays for the actual training and travel costs, *and* then requires their sales teams to be away from their leads for 3, 4, or even 5 days. In the months that follow, each sales person loses an average of 87% of the valuable skills and knowledge that had been crammed into a few days worth of workshops, because of a lack of reinforcement. Since the company knows the value of sales training, they will want their representatives to brush up on what they had learned - in effect, starting the sales training cycle again. With travel budgets being cut by most companies due to the current economy, on-site classroom events are becoming a less attractive option for sales training.

This is actually a good thing for companies looking for a greater return on their training investments. As mentioned briefly in the introduction, an October 2008 study by the research center Gartner (*Are You Providing the On-the-Job Learning That People Want?*, October 2008), found that people largely favor on-the-job over classroom-based training. This preference becomes very pronounced when looking at the younger generations of X and Y. New workers entering the market today favor on-the-job training, by a margin of up to 83% over other options.

This Gartner study also found that those surveyed prefer learning information in bite-sized chunks throughout the day instead of in large blocks of time, such as an eight-hour classroom. To many of us, this sounds familiar and is why we individually prefer to learn in short intervals, and apply the knowledge immediately.

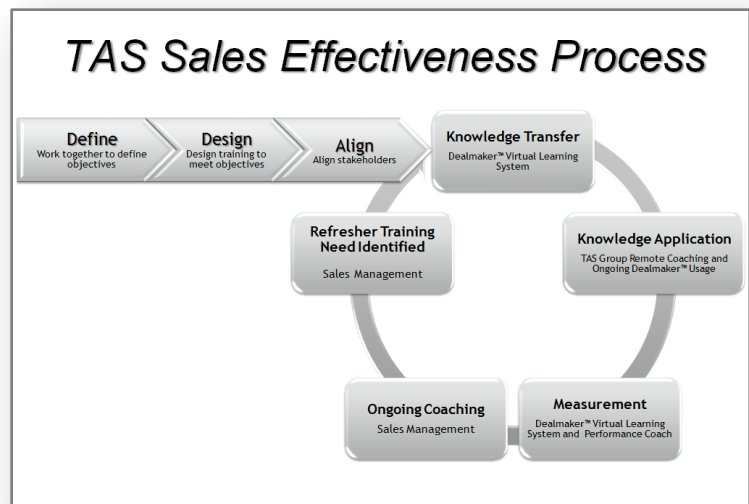


It turns out that beyond simply being preferred by most people, an on-the-job learning method broken into small segments can save sales professionals a substantial amount of otherwise lost revenue. IDC (International Data Corporation) recently calculated that re-focusing as few as 10 ancillary minutes a week towards active selling could bring in an additional \$57,000 a year per sales representative (IDC Sales Advisory Practice sales enablement research, November 2008).

The TAS Sales Effectiveness Process

Instead of less cost-effective classroom-based events, sales learning should be a continual process that is applied to specific sales situations and backed-up by certification, measurement, expert coaching, and refresher training. This is The TAS Sales Effectiveness Process.

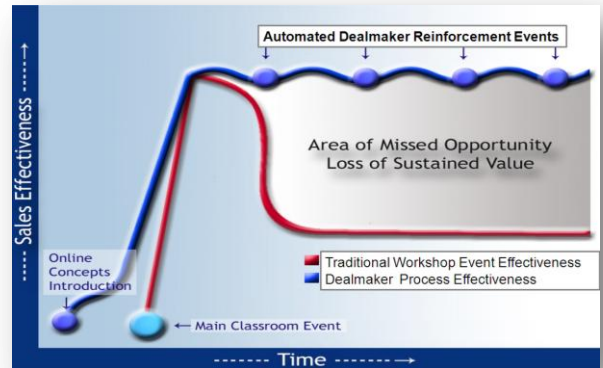
The TAS Sales Effectiveness Process, which Dealmaker is built upon, continues far beyond where traditional sales training stops - the point where knowledge is transferred. Like traditional sales training, The TAS Group's first steps are to define and design the sales training, and then align the key stakeholders before the actual training begins. The big difference between traditional classroom training and The TAS Group's approach is how our Dealmaker platform follows through with reinforcement and continually supports the sales person throughout his or her sales cycle.



After initial training is completed, the learned knowledge is applied and reinforced everyday by Dealmaker as sales people use the platform, through applying best practice in their deals and refreshing their knowledge. Certification tests are built directly into Dealmaker and can be taken anytime, assuring management that sales representatives are truly learning the skills and knowledge months after initial exposure to the material. The 87% of

knowledge that is lost during traditional training is largely retained with Dealmaker since the knowledge and skills are being reinforced and used every day.

Months after training is completed, continual automated measurement of sales people’s activity spots weak areas that need additional coaching or training. For those areas that need reinforcement, sales professionals are reintroduced to the training material to build and refine the knowledge and skills they learned the first time around. Let’s look at each of the phases of the on-the-job learning cycle to see how they work, and how to ensure success in a virtual delivery environment.



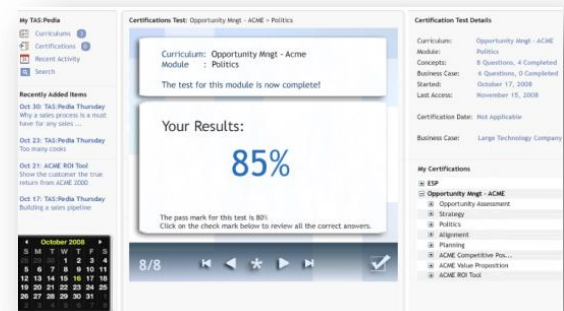
Knowledge Transfer

Taking several straight hours out of the day for training can be detrimental to our schedules and put us far behind where we want to be. Our normal days, however, are full of suspended moments perfect for a one or two minute training session or a certification test.



The Dealmaker Virtual Learning System’s proven on-the-job learning approach, segmented into easily digestible segments, is available on demand to sales teams worldwide. Each segment comes to the sales professional in a one to two minute video lesson and other media that can be consumed anytime throughout the week. This approach removes the need for travel expenditures to training events and allows individual sales representatives the ability to re-immers themselves in the curriculum whenever their schedule allows.

After learning a particular concept, built-in testing gives immediate feedback on the comprehension of that concept. Working through these individual segments, successful completion of the tests leads to certification on a given curriculum, complete with case studies that simulate on-the-job application of the concepts. Further, these results are aggregated by the Dealmaker Virtual Learning System to make sure that the sales team is learning what is required in whatever time frame is determined by management.



Knowledge Application

Since the amount we learn is less important than what we remember, Dealmaker’s Virtual Learning System relies heavily on actual ‘live’ account and opportunity reinforcement. After sales people complete their certification, virtual coaching by experts is applied to specific sales situations. For first line sales managers, this means hands-on assistance designed to strengthen the whole sales team.

With the help of expert sales coaching delivered by The TAS Group via telephone and webinar, sales professionals and managers are walked through their opportunities and accounts so newly acquired skills and knowledge can be retained and applied directly to where they are needed most. As with the initial knowledge transfer phase, virtual delivery means eliminating the scheduling headaches and expense of face-to-face classroom events, and allows for timely coaching to take place anywhere in the world, delivered by the same sales experts that you've come to appreciate in the classroom or workshop environment.

Equally important, since Dealmaker is used daily by sales professionals, the learning reinforcement mentioned above is a continual process. We learn by doing, and in this case doing the right thing repeatedly, prompted by

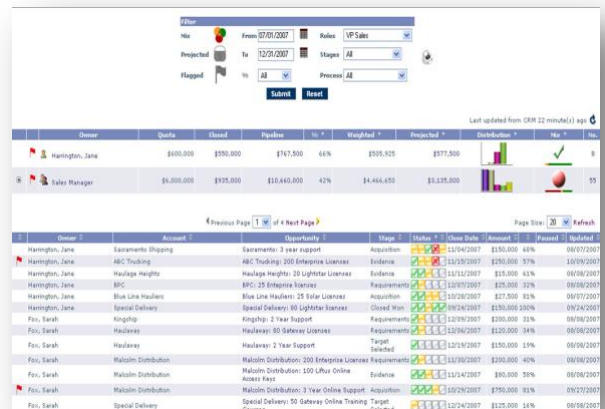
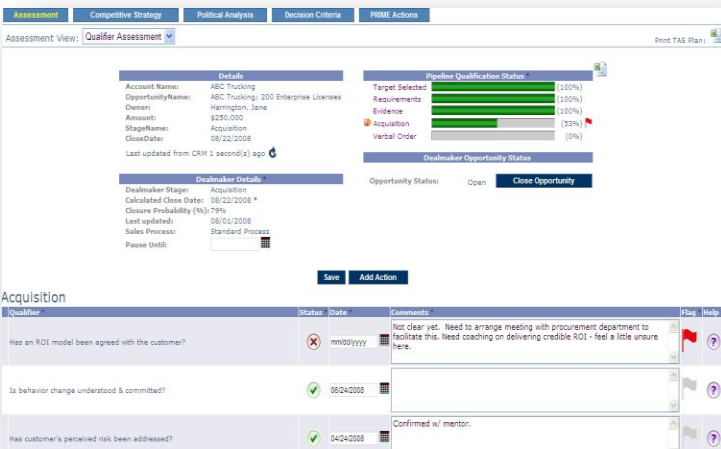
the sales methodology which is encapsulated in the Dealmaker platform. As the sales professional does his or her job, skills and key points are highlighted in the application. For instance, as shown in the screen shot on the left, key steps in the sales process are listed with a simple check box for the sales professional to indicate that it's been completed, started but not completed, or has not yet been started - a simple reminder of where they are in the sale, and what critical next steps are needed. This is just one example of how using the product itself providing continuous daily on-the-job learning and reinforcement for sales professionals. Also

included are all the elements of the TAS Opportunity Management and Account Management methodologies, which provide on-screen access as each element is required throughout the sales process.

Measurement and Coaching

Since a large part of sales training is in the application, it is important for management to measure and track how well individual sales people are doing overall, and with specific deals. Dealmaker's management capabilities, shown below, illustrate how measurement and coaching are accomplished. The steps a sales professional works on are tracked through the management window for observation, but also continual coaching. Early steps in the sales cycle that a professional might skip or do incorrectly might come back near the end to delay or even jeopardize the deal. With Dealmaker, managers can spot and coach their sales people through vital steps of the process that are essential for a successful sale.

With Dealmaker's Performance Coach capability, the general health of each sales representative or group's portfolio is broken down on the Health Check tab into active, stalled, and inactive categories. Depending on the length of time you consider an opportunity to be stalled and inactive, Health Check will group sales based on the total value of the deals. This allows managers the ability to identify potentially problematic



opportunities and accounts so they can coach individuals and groups on their inactive and stalled deals. Often, managers will be able to determine that a stalled deal is due to a lack of skills in a particular area that needs refresher training. And since this information is available through the sales organization, representatives can also see the deficiencies in their approach and do their own course correction.

A final area that managers are able to focus measurement on is the velocity of sales cycles. For both regions and individuals, the sales cycle is calculated to show managers how long each step in the cycle is taking and where potential improvement might be. These measurements can be viewed in relation to the average sales cycle, or against a target profile. This becomes a very useful tool as it takes conjecture out of coaching and replaces it with real numbers.

Region	Team	Target Selected	Target Qualified	Requirements	Evidence	Acquisition	Market Order	Total	Health
President	East Team	\$1,218,481	\$1,142,400	\$1,809,364	\$1,758,909	\$1,932,968	\$1,962,747		
	West Team	\$1,272,439	\$1,270,000	\$1,835,289	\$1,845,068	\$1,932,968	\$1,962,747		
	South Team	\$1,218,481	\$1,142,400	\$1,809,364	\$1,758,909	\$1,932,968	\$1,962,747		
	Average Profile	\$1,218,481	\$1,142,400	\$1,809,364	\$1,758,909	\$1,932,968	\$1,962,747		
	Target Profile	\$1,218,481	\$1,142,400	\$1,809,364	\$1,758,909	\$1,932,968	\$1,962,747		

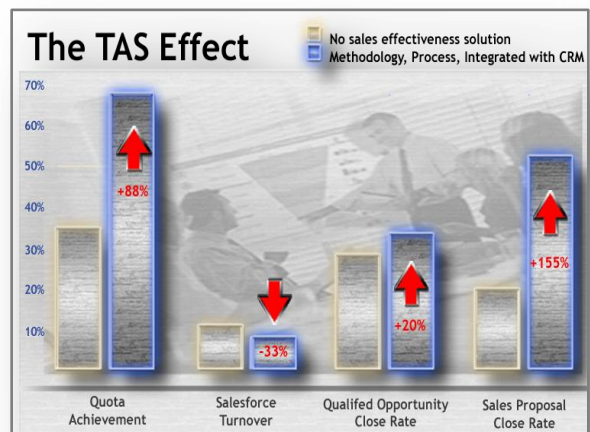
Region	Value	Average	No.	Duration	Sales Cycle Duration by Pipeline Stage in Days	TF Factor
President	\$1,280	\$2,440	2	64.0		0.9
East	\$6,513,880	\$18,375	170	212.5		0.5
West	\$25,717,786	\$333,284	249	189.7		1.2
South	\$25,058,443	\$68,761	219	193.4		3.4
Average Profile	\$47,249,593	\$74,059	638	202.8		14.0
Target Profile				144.1		

With the help of these measurement tools, managers can determine if and when refresher training is needed. Of course, not all of the training needs to be retaken in most cases. Managers are able to specify what segments and skills need to be covered again, and then simply send sales people back to the Dealmaker Virtual Learning System to refresh themselves only on the required segments, and re-test as necessary.

Blended Learning and the Impact on Sales Performance

By treating sales effectiveness as a process rather than an event, you have seen the importance of combining sales methodology, process, and a technology platform that can train, guide, and measure performance. But what's the impact? The TAS Group's TAS Index Survey provides insight into that question, and indicates that significant gains are the norm when methodology, process, and technology come together: 88% improvement in quota achievement, and large gains in deal close rates. Also noteworthy is the 44% improvement in adoption rates for CRM, with which the Dealmaker on-demand platform fully integrates.

These impacts are fully attainable with virtually delivery, as the economic demands of today often dictate. However, where budget is available and customers have a preference for face-to-face delivery in the form of tradition workshops, the TAS Group is happy to offer optional workshops to combine with the Dealmaker platform. In this blended environment, Dealmaker still provides the same benefits throughout the sales effectiveness cycle. Knowledge transfer can still take place virtually, preparing and certifying sales people before they enter the workshop to maximize its effectiveness. Post-training, the same on-the-job learning aspects, measurement, and coaching



tools combine to ensure that the work done in the classroom continues to be reinforced and measured to provide maximum ROI on your training investment.

The TAS Group's Advantage

When considering sales training, we all know it's important to keep in mind not only the total cost of training, but the total return on our investment. With travel costs rising and budgets tightening, The TAS Group's Dealmaker platform is an immediate and cost-effective learning solution for dedicated sales professionals.

In this White Paper, we've covered the important difference between treating sales effectiveness as a process, rather than a disconnected series of classroom sales training events. We've learned how knowledge and skills are transferred in easily digestible pieces designed for better and faster acquisition. We discussed how expert coaches help you apply what was learned to your specific sales situation, followed by the daily use of Dealmaker to reinforce concept application. Finally, we touched on how sales managers can easily measure the success and spot the weaknesses in their sales force.

We'd be delighted to discuss your specific needs further, and explore how our unique sales methodology, sales process, and Dealmaker technology can be combined to drive sales effectiveness in your organization. If you wish to find out more about The TAS Group's sales effectiveness offerings, or anything else discussed in this White Paper, please contact us at marketing@thetasgroup.com.