

Why Product Training Often Disappoints, and How to Make it Better

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Introduction

When it comes to delivering effective product training, most organizations are challenged to keep their content up to date with the latest launches. Products are changing all the time, but what really needs to be communicated to the teams who interact with them? What are the perennial aspects of product training, and how can you equip your teams with an understanding of what is most essential without getting caught in a costly cycle of training updates?

When you talk to a typical sales force about the product training they get, you generally find a lot of dissatisfaction. Often it is not that the training is missing the very latest updates. On the contrary, most learners agree that the training provides reasonably good product information—specifications, features, and options—but it doesn't tell them how their customers will benefit from the product. This point is routinely overlooked and, in the face of unused training and learner dissatisfaction, many organizations incorrectly conclude that sales and other teams simply do not value training. In fact, what they value is *relevant training*.

I. The Problem with Product Training

Let's face it, as long as your business is rolling out new products and product updates, you will always be challenged to deliver new training. In order to keep training current with your latest release, you need to develop content against tight timelines, controlling costs as much as possible in the process. But timelines and cost-saving measures necessarily introduce compromise into the training; and it is the accumulation of compromises that is often damaging to training outcomes.

The first compromise we make, usually to save on production expenses, is to condense training for different roles into the same module. Organizations may include sales training along with installation or maintenance procedures in one course. Jumbling distantly related topics into one module may save money, but the practice diminishes the overall effectiveness of the training. Just imagine trying to bundle driver's education, the basics of car sales, and automotive maintenance training into one module and you'll see that a singular product needs many different training approaches.

The second and more damaging compromise is to lower the goal of the training to merely teaching people "about" the product. This makes training development easier, and facilitates the collapsing of roles mentioned above. When an organization narrows the focus of training to product features, the purpose of the training can be easily forgotten. Also, when "how to sell" or "how to use" a product is left out of training, it only serves to compound learner dissatisfaction and the neglect of training altogether. Merely imparting knowledge of product features in no way guarantees the ability to sell the product, especially now that customers are increasingly able to get such information themselves.

II. The Elements of Effective Training

To be effective, training needs to comprehend a number of elements, of which product features are only one. The following list is especially appropriate for sales training, but can apply to any audience.

- **The customer persona:** Who is intended to use the product? What are their wants and needs? Does training reflect an accurate picture of your product's target audience?
- **Variations in usage:** How will different customers use the product? What products are most complimentary?
- **Alternative products:** Each customer has different preferences and needs. If one particular product "doesn't fit," what other products in your arsenal might better suit them?
- **Competing products:** What are your competitors selling? Why is your product superior?
- **Customer objections:** Every customer has a unique set of concerns, objections, and fears. Which of these are most commonly encountered, and how can you address them effectively?
- **Customer biases:** Many customers have already "done their homework," and bring a set of opinions about what they "know" to the table. How do you fill in the gaps of their understanding, realign their biases, and empower them to make the right decision?

III. Building Relevance into Your Training

Of course, an awareness of these elements in isolation isn't very helpful. What matters is whether you are able to integrate them together in useful ways. Listening to your sales team or target training audience is a good place to start learning where emphasis should be placed. There is a very real skill involved in knowing how to sell a particular product effectively, and chances are, your sales team can give your training developers some valuable insights. Even with this information, training can still fall short of being relevant. In order to provide true relevancy, three actions are necessary.

First, trainers need to identify the most important thing that learners are expected to do with their product knowledge. Are they intending to market the product, sell it, or repair it? Once this is understood, developers can begin to break these skills down to individual components. For example, helping potential customers identify their needs is one aspect of selling, performing a product demo is another, helping a customer choose between competing products is a third, and so on. Though not incompatible, each of these actions is a skill that demands its own approach to training.

The second action to take to build relevant training is to keep the big picture in mind. While detailed product specifications may be in a constant state of change, the way in which products relate to customer needs tends to stay fairly stable over time. For example, cars keep changing and taking advantage of new technology, but the things that matter most to people—ride, handling, acceleration—are the same as they have been for many years. Thus if a car gets fifteen more horsepower, it doesn't require the salesperson to master a whole new way of talking to the customer about power. Focusing on what the salesperson needs to do (like concentrate on selling power) rather than on product specifications (15 more horsepower) actually leads to a more stable picture of training.

The impulse to assemble all of the facts into training materials tends to place emphasis on learning certain specifications rather than the core needs of the salesperson. Of course, salespeople may still need to memorize certain information, if only because customers will expect them to know it. But in today's environment, it's often unnecessary to make people memorize many details because information is easy to look up. What learners need to discern is how to relate facts about a product to the things customers care about—how to make them relevant.

Product details can make a considerably higher impact when the salesperson understands the core customer need behind a given product enhancement.

The third way to provide relevant training is to organize it around those opportunities where a salesperson can make the highest impact. This requires an awareness of the situations that salespeople are likely to find themselves in, and preparation for those critical moments. For example, one might educate auto salespeople on how to talk about a particular model for customers who are interested in convenience for a family, customers who are interested in luxury, and customers who are interested in being green. Each of these different conversations will involve a discussion of some of the car's features, but in a way that is unique to their need.

Training that anticipates focused, high-impact interactions is truly the most cost-effective, since it is rooted in a demonstrable need. In addition, this type of training doesn't need to be rewritten or updated as often, since the precise product feature details are generally not critical to the conversations. Of course, sometimes there are new features or products that require a whole new set of materials; but for many smaller changes, training that speaks to the highest impact interactions can be a perennial resource.

IV. The Value of Critical Mistakes

Of course, while product specifications are finite (if sometimes large), the number of possible interactions with customers is infinite. To compensate, training developers need a way to prioritize which interactions will have the most impact—and what specifically is most helpful to learn about each. Although teams may come to an understanding of these interactions by guesswork, empirical investigation provides the only sure path to success. One approach to achieving a fact-based understanding is Cognitive Art's Critical Mistake Analysis methodology. By analyzing where salespeople are most likely to go wrong with customers, as compared to what a top-notch salesperson would do, this approach identifies those specific areas where training will have the highest impact.

Critical Mistake Analysis

Critical Mistake Analysis methodology uses empirical data to identify the most important issues that training should focus on. By identifying the most common and costly mistakes made by novices deploying target skills in the real world and performing a root-cause analysis to determine the underlying causes of these mistakes, Critical Mistake Analysis demonstrates exactly what content will have the most significant business impact.

Critical Mistake Analysis is a Five-Step Process

Step 1: Identify the critical mistakes.

Information about critical mistakes is gathered through a combination of surveys, interviews, and on-the-job observations, along with whatever operational data is available.

Step 2: Identify the most common mistakes.

Further analysis is performed to determine the frequency and impact of each mistake. These quantities give an estimate of the overall impact of a given type of mistake on the organization. The distribution of impacts roughly obeys a Pareto, or "80:20" distribution, which means that the top 20 percent of observed mistakes will typically account for 80 percent of the overall impact of all mistakes.

Step 3: Perform a root cause analysis of the mistake.

The analysis of critical mistakes focuses on three key issues: first, the decision that leads to the mistake; second, the contextual factors that make the mistake likely; and third, the underlying beliefs that lead people to make the wrong decision.

Step 4: Create "teaching points."

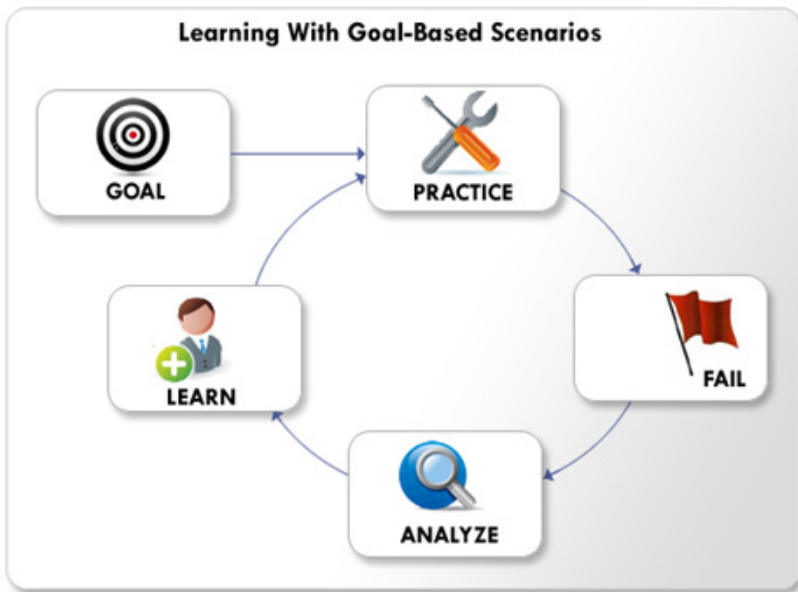
The output of a Critical Mistake Analysis is encoded in a set of "teaching points" that encapsulate our understanding of each mistake in a way that facilitates the development of training to remediate it. A teaching point combines a description of a mistake, an analysis of why that mistake was made, an explanation of how to avoid it, and why this alternative approach is preferable.

Step 5: Create training from the teaching points.

The fundamental approach to teaching point-based training is the goal-based scenario. Goal-based scenarios make it possible for learners to practice skills and acquire relevant experience without the potentially negative consequences of making mistakes in real life. In a goal-based scenario, the learner is given a mission, or goal, and an opportunity to practice trying to achieve that goal in a realistic environment. As the learner pursues the goal, he or she faces challenges that are based on the teaching points identified through a critical mistake analysis. When the learner makes one of the critical mistakes, he or she is supported with focused coaching designed to help in analyzing the reasons for the mistake, and ultimately, in learning from the experience.

V. Summary

In each of the approaches outlined above, the focus of product training shifts from the product itself to specific, audience-focused situations in which product knowledge is needed. Once this is understood, the training can help prepare learners for how to handle these situations effectively. Training does not, in most cases, need to be highly sensitive to minor changes in these features. Specific product details can always be memorized or “taught” separately, as a means to demonstrate competency or support some aspect of the sale. In general, empirical methods like Critical Mistake Analysis are recommended to help identify the topics on which training modules will have the highest impact on performance.



The Critical Mistake Analysis methodology evolved from extensive research conducted at Northwestern University’s Institute for the Learning Sciences. Cognitive Arts has proven the value of this approach in numerous client engagements across a variety of industries and content areas.

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