STRATEGIES FOR SUSTAINING THE IMPACT OF SALES TRAINING
Overview

Organizations depend on their sales professionals to sustain profit levels and drive revenue growth. To prepare them for this responsibility, businesses invest substantially in their training and development. A recent Training Industry, Inc. study of those responsible for sales training programs revealed that these training programs are generally considered effective, with approximately 81% of respondents indicating that their organization’s sales training programs are somewhat or very effective (2013). However, they may be less effective at sustaining the impact of such training and development programs over time. With estimates of the global sales training market exceeding $2 billion annually, the importance of sustaining the impact of that investment cannot be overstated. The current study addresses this important goal by investigating approaches that organizations use to sustain sales training and highlighting recommended strategies for maximizing the impact of sales training over time.

In October 2013, one hundred and ninety-three companies participated in a Training Industry, Inc. study on sustaining sales training. The purposes of this research were to:

- Identify organizational strategies used to sustain the impact of sales training,
- Establish pre-, during, and post-training best practices for maximizing the duration of sales training impact,
- Estimate the length of time that the impact of sales training is typically maintained, and
- Review the allocation of organizations’ sales training budgets across various sales training program strategies throughout the training cycle.

Throughout this report, differences in the approaches used by organizations considered effective and organizations considered ineffective at sustaining sales training are emphasized. Results of these comparisons provide information that organizations can use to improve their own sales training programs and increase the duration of program impact on sales professionals’ performance.
Key Findings

- **Only 32%** of respondents rate their organization *effective* or *very effective* at sustaining the impact of their sales training program.
- More than half of respondents report that their organizations sustain the impact of sales training for **greater than 3 months** following training.
- Organizations rated as effective invest less in the delivery of sales training and more in the planning, evaluation, and sustainment of that training.
- In our study, effective companies sustained the impact of training **63% longer** than ineffective companies.
- The most frequently used pre-training strategies for sustainment involve communicating the importance of and expectations for training.
- Effective organizations **utilize more pre-training strategies** for sustaining training, including establishing post-training developmental plans and optimizing the sales management process before training begins.
- In-person and virtual instructor-led training are the most frequently used modalities for delivering training.
- Effective organizations are more likely to **utilize gamification and competition** both during and following training.
- While tracking performance metrics was the most frequently used evaluation technique across all learning leaders, effective organizations consistently **use more evaluation techniques to assess the impact of training**.
- Providing refresher training and using curated learning portals were the most frequently used post-training techniques for sustaining sales training.
- Effective organizations **use mobile/tablet reinforcement** solutions post-training more frequently than ineffective organizations.

5 Strategies for Sustaining Training

1. Invest in sustainment.
2. Establish post-training developmental plans before training begins.
3. Utilize gamification during and after training.
4. Use mobile/tablet reinforcement solutions.
5. Evaluate and provide individual feedback on training.
Sales Training Program Characteristics

Respondents were asked to provide information on their companies’ sales training programs. The following details their responses regarding sales training sustainment effectiveness, duration, and budget allocation.

Organizational Effectiveness Ratings at Sustaining Sales Training

When asked about their organization’s ability to sustain the impact of its sales training investment, only 32% of respondents rated their organization as very effective or effective (see Figure 1). In contrast, 68% indicated that their company was somewhat effective or ineffective at sustaining the impact of its sales training investment.

Figure 1. Ratings of Organizational Effectiveness at Sustaining Sales Training

Percentage of Respondents, N = 182

Throughout this report, the effective group (i.e., organizations rated effective or very effective) is compared with the ineffective group (i.e., organizations rated somewhat effective or ineffective) in order to identify practices that differentiate effective and ineffective organizations. In doing so, the report highlights effective strategies for sustaining the impact of sales training.

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Sales Training Investment Allocation

When asked to estimate the percentage of their organizations’ sales training budget that is allocated to various training activities, respondents revealed that their organizations invest most (41%) of their budget in training delivery, followed by planning, sustainment, and evaluation (see Figure 2).

Figure 2. Sales Training Investment Allocation

A comparison of the effective and ineffective groups reveals that effective organizations invest a significantly larger portion of their budget in sustainment ($r = .39, p < .05$) and a significantly smaller portion in delivery ($r = -.30, p < .05$), creating a more balanced approach. Figure 3 illustrates differences in the average budget allocations of the effective and ineffective groups.

Percentage of Respondents, N = 183
Figure 3. Effective vs. Ineffective Group: Budget Allocation

Ineffective Group, N = 123

- Evaluation, 14%
- Sustainment, 13%
- Planning, 27%
- Delivery, 46%

Effective Group, N = 58

- Evaluation, 17%
- Sustainment, 21%
- Planning, 31%
- Delivery, 31%

Duration of Sales Training Impact

When asked about the average length of time that their company’s sales training program participants demonstrate all trained behaviors, 25% reported not knowing how long these behaviors are demonstrated. Of those who reported knowledge of the duration of trained behaviors, more than half (52%) indicated that sales professionals exhibit all targeted behaviors for longer than 3 months following training, (see Figure 4).

Figure 4. Duration of Sales Training Impact

- More than 1 year, 20%
- 30 to 90 days, 48%
- 91 to 180 days, 26%
- 181 to 365 days, 6%

Percentage of Respondents, N = 184
The effective group reported sustaining training approximately 63% (i.e., 100 days) longer than the ineffective group. Figure 5 depicts this relationship.

**Figure 5. Ratings of Sustainment Effectiveness by Average Days of Impact Sustained**
Strategies for Sustainment Prior to Training

Respondents were asked to provide information about the strategies that their organizations use prior to sales training to ensure that the impact of that training is sustained. The following details the most commonly used strategies and highlights those that were associated with longer sustainment of sales training impact.

Setting Learner Expectations

The most frequently used approaches for setting learners’ expectations prior to sales training revolved around communicating with participants; the majority of companies communicated the strategic importance of training to participants and had managers communicate expectations for training outcomes before training began. Figure 6 depicts differences in methods of setting expectations used by the effective and ineffective groups. As can be seen, the effective group engages in each of the methods more frequently than does the ineffective group. Most notably, the effective group was more than two times as likely to establish post-training development plans ($r = .33$, $p < .01$) and prepare leaders to lead the change than was the ineffective group ($r = .28$, $p < .01$).

Effective companies are more likely to establish post-training developmental plans and prepare leaders to lead change.
Figure 6. Effective vs. Ineffective Group: Strategies for Setting Expectations

- Prepare sales managers to reinforce change
  - Effective Group: 70%
  - Ineffective Group: 41%

- Communicate strategic importance of training to participants
  - Effective Group: 70%
  - Ineffective Group: 58%

- Have managers communicate expectations for training outcomes
  - Effective Group: 68%
  - Ineffective Group: 48%

- Establish and communicate key performance indicators the training will impact
  - Effective Group: 67%
  - Ineffective Group: 38%

- Establish post-training developmental plans
  - Effective Group: 65%
  - Ineffective Group: 31%

- Make participants aware of how they’ll be evaluated
  - Effective Group: 63%
  - Ineffective Group: 44%

- Prepare leaders to lead change
  - Effective Group: 53%
  - Ineffective Group: 21%

- Create excitement through videos promoting the training
  - Effective Group: 35%
  - Ineffective Group: 11%

- Inform cross-functional leaders of the initiative
  - Effective Group: 33%
  - Ineffective Group: 25%

- None of the above
  - Effective Group: 7%
  - Ineffective Group: 25%

- Percentage of Effective Group, N = 57
- Percentage of Ineffective Group, N = 123
Further, respondents whose organizations establish post-training developmental plans and establish and communicate Key Performance Indicators (KPIs) impacted by training prior to training implementation reported significantly longer sales training impact duration. Those that establish and communicate KPIs prior to training observe participants demonstrating all of the targeted sales behaviors 67% longer than those that don’t. Similarly, those whose organizations establish post-training developmental plans prior to training reported that training impact was sustained 87% longer (i.e., 120 days longer) than those whose organizations did not utilize this strategy. Thus, results indicate that organizations should consider establishing post-training developmental plans, preparing leaders to lead the change, and providing information about targeted KPIs prior to implementing training in order to increase the duration sales training impact.

Pre-training Support
When asked about the pre-training activities that their organizations use to support sales training sustainment, respondents most frequently indicated that their organizations use sales playbooks, guides, and tools. A comparison of the pre-training activities used by effective and ineffective organizations revealed that, overall, effective organizations are more likely to utilize each of these prior to training in support of training sustainment (see Figure 7). Of note is the large difference between effective and ineffective organizations’ use of sales management process optimization; the effective group was more than three times as likely to report using this for pre-training support than was the ineffective group.
Those that use sales management process optimization sustain the impact of training 129 days longer.

The use of pre-training sales management process optimization was also associated with longer reported sales training impact. Respondents whose organizations engage in this pre-training activity reported that participants demonstrate the trained sales behaviors approximately 78% longer (i.e., 129 days longer) than those whose organizations do not use sales management process.
optimization. Therefore, sales training program decision makers are advised to conduct a review of the sales management process before implementing sales training programs.

**Tools and Technology for Sustaining Sales Training**

Respondents were asked to indicate which tools and technology were important for ensuring sustainment during pre-training activities. Webinars and instructional videos were most frequently identified as important, while gamification and blogs were least frequently endorsed as important. Figure 8 presents the percentage of respondents indicating that each tool/technology is important before training.

**Figure 8. Importance of Pre-training Tools and Technology for Sustaining Training**

- Webinars: 37%
- Instructional videos: 34%
- Mobile learning: 28%
- Job aids: 26%
- Social networking tools (e.g., chat rooms, online forums): 22%
- Wikis or knowledge repositories: 21%
- Podcasts: 20%
- Blogs or microblogs: 16%
- Gamification: 10%

Percentage of Respondents, N = 175
Strategies for Sustainment during Training

The following section provides information about the strategies that organizations use for sustaining the impact of sales training while it is being delivered. Differences between the strategies used by organizations rated as effective and those rated as ineffective at sustaining sales training are emphasized to draw attention to practices that are likely to result in greater training sustainment.

Modalities

Instructor-led training (ILT) and virtual instructor-led training/webinars were the most frequently used modalities to sustain sales training impact. Figure 9 presents the percentage of organizations utilizing each modality during training.

Figure 9. Modalities Used during Training to Sustain Sales Training Impact

Percentage of Respondents, N = 182

Reinforcing Learning

The most frequently used strategies for reinforcement knowledge retention during training were providing role play opportunities and job relevant examples. As can be seen in Figure 10, almost twice as many effective organizations provide individual feedback on learning assessments. Further, the effective group was significantly more likely to use gamification/competition in the classroom to reinforce learning; those that did use gamification experienced 57% longer (i.e., 97 days longer) training impact, on average, than those not using this strategy. Thus, effective strategies for sustaining the impact of training include providing individual feedback and utilizing gamification during training.

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Figure 10. Effective vs. Ineffective Group: Use of Strategies for Reinforcing Learning

- Provide job relevant examples
  - Percentage of Effective Group, N = 57: 79%
  - Percentage of Ineffective Group, N = 123: 71%

- Provide role play opportunities
  - Percentage of Effective Group, N = 57: 75%
  - Percentage of Ineffective Group, N = 123: 72%

- Provide individual feedback on learning assessments
  - Percentage of Effective Group, N = 57: 68%
  - Percentage of Ineffective Group, N = 123: 37%

- Provide opportunities for peer experience sharing
  - Percentage of Effective Group, N = 57: 58%
  - Percentage of Ineffective Group, N = 123: 61%

- Utilize case studies
  - Percentage of Effective Group, N = 57: 53%
  - Percentage of Ineffective Group, N = 123: 51%

- Provide experiential experiences
  - Percentage of Effective Group, N = 57: 53%
  - Percentage of Ineffective Group, N = 123: 44%

- Assess individual learning
  - Percentage of Effective Group, N = 57: 53%
  - Percentage of Ineffective Group, N = 123: 30%

- Provide “how to learn” training (e.g., teaching learners how to continue learning)
  - Percentage of Effective Group, N = 57: 42%
  - Percentage of Ineffective Group, N = 123: 23%

- Space learning/practice into intervals
  - Percentage of Effective Group, N = 57: 40%
  - Percentage of Ineffective Group, N = 123: 31%

- Utilize gamification/competition in the classroom
  - Percentage of Effective Group, N = 57: 37%
  - Percentage of Ineffective Group, N = 123: 24%

- Model targeted skills face-to-face or through video
  - Percentage of Effective Group, N = 57: 35%
  - Percentage of Ineffective Group, N = 123: 31%

- None of the above
  - Percentage of Effective Group, N = 57: 0%
  - Percentage of Ineffective Group, N = 123: 3%

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Tools and Technology for Sustaining Sales Training

Similar to their ratings of pre-training tools and technology, respondents most frequently indicated that instructional videos were important during training for sustaining the impact of training. Job aids were rated second most important. Interestingly, respondents were considerably more likely to indicate that gamification is important during training than they were prior to training. Finally, blogs and podcasts were least frequently endorsed as important during training (see Figure 11).

Figure 11. Importance of Tools/Technology during Training for Sustaining Training

- Instructional videos: 61%
- Job aids: 56%
- Webinars: 47%
- Gamification: 37%
- Mobile learning: 28%
- Wikis or knowledge repositories: 26%
- Social networking tools (e.g., chat rooms, online forums): 21%
- Podcasts: 15%
- Blogs or microblogs: 11%

Percentage of Respondents, N = 175
Strategies for Sustainment Post-training

The following section details respondents’ results regarding post-training strategies for sustaining sales training impact. As in the previous two sections, where relevant, differences between the effective and ineffective groups are highlighted to emphasize best practices for sustaining the impact of sales training.

Encouraging On-The-Job Application of Training

When asked about strategies for encouraging on-the-job application of training, respondents most frequently reported that their organizations provide refresher training and/or opportunities to learn from peers. In contrast, the effective group most frequently reported providing individual feedback on skill assessments as a strategy for encouraging on-the-job training application (see Figure 12). They utilized this strategy and gamification almost twice as frequently as did the ineffective group. Moreover, respondents whose organizations utilized opportunities to learn from peers reported sustaining sales training impact 35% longer.
### Figure 12. Effective vs. Ineffective Group: Strategies for Encouraging Transfer

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Percentage of Effective Group</th>
<th>Percentage of Ineffective Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide individual feedback on skill assessments</td>
<td>60%</td>
<td>31%</td>
</tr>
<tr>
<td>Provide refresher training in core concepts</td>
<td>58%</td>
<td>48%</td>
</tr>
<tr>
<td>Provide opportunities to learn from peer experiences</td>
<td>58%</td>
<td>38%</td>
</tr>
<tr>
<td>Provide regular/ongoing coaching sessions</td>
<td>56%</td>
<td>36%</td>
</tr>
<tr>
<td>Provide opportunities for shadowing and on-the-job observation</td>
<td>56%</td>
<td>33%</td>
</tr>
<tr>
<td>Publicize individual/team sales performance levels</td>
<td>38%</td>
<td>31%</td>
</tr>
<tr>
<td>Provide just-in-time coaching</td>
<td>38%</td>
<td>30%</td>
</tr>
<tr>
<td>Communicate individual KPIs</td>
<td>35%</td>
<td>22%</td>
</tr>
<tr>
<td>Assess training adoption on an individual level</td>
<td>35%</td>
<td>17%</td>
</tr>
<tr>
<td>Utilize gamification</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>None of the above</td>
<td>5%</td>
<td>13%</td>
</tr>
</tbody>
</table>

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Sales Aids
Respondents indicated that learning portals/knowledge repositories and value stories/case studies were the most frequently used sales aids following training to support training sustainment. A comparison of the effective and ineffective groups reveals that the effective group used mobile/tablet reinforcement solutions more than three times as often and client spotlights more than twice as often as did the ineffective group (see Figure 13). Further, respondents whose organizations used mobile/tablet reinforcement solutions reported 50% longer sustained training impact.

Figure 13. Effective vs. Ineffective Group: Use of Post-training Sales Aids

- Learning portal/knowledge repository: 40% vs. 53%
- Value stories or case studies: 40% vs. 51%
- Product profiles: 35% vs. 44%
- Mobile or tablet (iPad, Android, Windows) reinforcement solutions: 12% vs. 40%
- Meeting templates: 25% vs. 36%
- Client spotlights: 12% vs. 31%
- Proposal templates: 21% vs. 27%
- Solution briefs: 18% vs. 24%
- Objection resolution documents: 18% vs. 24%
- None of the above: 9% vs. 16%

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Evaluating the Sustained Impact of Sales Training

When asked about the measurement strategies used by their companies to evaluate sales training sustainment, respondents revealed that tracking sales and performance metrics was the most frequently used strategy. Further, a comparison of the effective and ineffective groups shows that the effective group was far more likely to use each of the various measurement strategies than was the ineffective group (see Figure 14). Effective organizations were more than three times as likely to assess learners' expectations of organizational support provided and received and more than twice as likely to measure networking/interactivity, track coaching activity, measure content relevance, and test skills/capabilities gains. Further, results indicate that organizations that assess learning transfer observe 72% longer (i.e., 112 days longer) training impact sustainment than those that do not. Organizations that measure business impact observe 62% longer training sustainment than those that do not.
Figure 14. Effective vs. Ineffective Group: Evaluating Training Sustainment

- Track sales and performance metrics: 69% Effective, 59% Ineffective
- Test knowledge gain: 58% Effective, 35% Ineffective
- Measure business impact: 55% Effective, 33% Ineffective
- Test skills/capabilities gain: 53% Effective, 24% Ineffective
- Measure user participation/engagement: 47% Effective, 31% Ineffective
- Track coaching activity: 44% Effective, 16% Ineffective
- Assess whether learning is transferred to the work environment: 42% Effective, 21% Ineffective
- Measure content relevance: 38% Effective, 17% Ineffective

- Assess learners’ expectations of organizational support provided: 25% Effective, 7% Ineffective
- Assess learners’ expectations of organizational support received: 31% Effective, 9% Ineffective
- Measure networking, interactivity, and collaboration: 22% Effective, 8% Ineffective
- None of the above: 13% Effective, 5% Ineffective

Percentage of Effective Group, N = 55
Percentage of Ineffective Group, N = 121

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**Tools and Technology**

When asked about the importance of various tools and technology for sustaining the impact of sales training, respondents most frequently endorsed job aids, webinars, and wikis/knowledge repositories as important to post-training activities, mirroring their reports of the importance of these tools and technology both before and during training. Figure 15 illustrates the percentage of respondents indicating that each tool/technology is important following training.

Interestingly, while gamification was fourth most important during training, it was least frequently endorsed as important for both before and after training activities. Further, while instructional videos were rated in the top three in terms of their importance before and during training, learning leaders were far less likely to rate them as important for post-training activities.

**Figure 15. Importance of Post-training Tools and Technology for Sustaining Training**
Best Practices

When asked to provide a best practice to sustaining sales training, respondents touched on several themes. Best practices included providing sales coaching, evaluating the impact of training, reinforcing training through follow-up refresher activities, and encouraging interaction amongst participants. Follow-up refresher activities suggested by respondents included providing post-training feedback and using post-training meetings and emails to reinforce sales training. Finally, respondents’ recommendations for designing for and encouraging manager and peer participation included involving managers in the training process and allowing for peer interaction and experience sharing. Finally, the importance of evaluating the impact of training cannot be overstated; not only did respondents list it as a best practice, but our aforementioned results revealed that effective organizations are far more likely to evaluate training.
Major Takeaways

The results of this study provide a benchmark of the length of time that the impact of sales training can be expected to be sustained. More than half of respondents reported that behavioral changes in sales training professionals are maintained for greater than three months following training. With 68% of respondents rating their organizations as somewhat effective or ineffective at sales training sustainment, it is clear that most organizations can improve their sales training by engaging in strategies for sustaining sales training impact. Figure 16 presents a model summarizing recommendations for sales training sustainment throughout the training cycle.

Figure 16
**Pre-training.** Results overwhelmingly indicated that pre-training activities have a major impact on sales training sustainment. Effective organizations invested more in planning and were significantly more likely to use pre-training strategies to set learner expectations and support training. Among these strategies, establishing post-training developmental plans and optimizing the sales management process resulted in the greatest levels of sales training sustainment.

**During training.** Results point to a much smaller role for activities completed during training. Indeed, organizations that invest more in training delivery experienced significantly lower sales training sustainment. Still, some activities completed during training were important for training sustainment; organizations that utilized gamification in the classroom and provided individual feedback on learning assessments were significantly more effective at sustaining the impact of sales training. These findings are particularly interesting in light of the relatively small frequency of organizations actually using gamification during training.

**Post-training.** Unsurprisingly, respondents stressed the importance of evaluating training. Effective organizations utilized every evaluation technique more frequently than did organizations considered ineffective at sustaining sales training. Further, a sizable 25% of respondents reported being unsure of how long their organizations’ sales training participants exhibit trained behaviors. These results point to a need for continuous evaluation, in order to better inform organizational sales training decisions and increase the length of time that training impacts sales professionals’ performance.

Results indicate that a number of post-training activities also result in longer and more effective training sustainment. Organizations that use mobile reinforcement and client spotlights were rated more effective at sustaining sales training. Mirroring the findings on effective strategies for sustainment during training, results suggest that providing feedback on assessments and using gamification lead to greater sales training sustainment effectiveness. It is surprising that post-training gamification led to greater sustainment, as only 24% of respondents indicated that it is important for post-training activities. Thus, while gamification is less frequently used and rated less important, its use results in more effective and longer lasting sales training impact.
Demographics
The following provides information about respondent’s demographic characteristics.

Company Sizes
Approximately 55% of respondents came from organizations with 500 or more employees (see Figure 17).

Figure 17

Percentage of Respondents, N = 193
**Industries Represented**

Approximately 47% of respondents represented the top five industries, including Retail, Technology, Business Services/Consulting, Training and Development, and Banking/Finance (see Figure 18).

**Figure 18**

- **Retail**: 11%
- **Technology (Computers, Software, ISP, etc.)**: 10%
- **Business Services/Consulting**: 10%
- **Training and Development**: 8%
- **Banking/Finance**: 7%
- **Insurance**: 6%
- **Manufacturing-Durable Manufacturing**: 4%
- **Education(K-graduate)**: 4%
- **Pharmaceuticals**: 4%
- **Manufacturing-Non-Durable**: 4%
- **Hospitality**: 4%
- **Construction**: 4%
- **Telecommunications**: 3%
- **Other Industry (e.g., Health Care, Transportation, etc.)**: 22%

Percentage of Respondents, N = 193
**Departments**

The majority of respondents held positions in Sales (see Figure 19).

**Figure 19**

Percentage of Respondents, N = 193
**Job Roles**

Approximately 69% of respondents held leadership titles (i.e., management or executive-level roles; see Figure 20).

**Figure 20**

Percentage of Respondents, N = 193
About This Research

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Richardson is a global sales training and performance improvement company. We have over 30 years of experience creating customized solutions that build organizational ability and improve individual skill necessary to grow profitable sales.

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