Sales Training Effectiveness : A Review

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Abstract

The current market situation is twofold - organizations are coping with the present marketplace scenario of globalization, tough competition, technology, and changing demographics, whereas salespeople face sophisticated and knowledgeable customers, impinging enormous pressure to perform at levels never seen and faced before. Sustainability through skilled sales force serves as a primary rationale for organizations to invest in sales training. Thus, sales organizations now emphasize on competencies and commitment for continual learning apart from task-related knowledge, skills, and abilities, which are now required, expected, and demanded from all the workforce. These aspects are likely to bring significant changes in the strategic approach towards sales training content, learning, and methodology. This paper aims to build a narrative literature review in relation to sales force training evaluation and effectiveness published between 1982- 2012. The present paper examines the emergence and impact of competencies, methodologies, transfer of learning on training effectiveness over a period. Several research gaps were identified, especially in the areas of performance improvement for managers as well as the factors affecting learning adoption, content, and trainees' perceptions. The paper closes with some observations on sales training effectiveness aspects, with emphasis on efficiency and several specific areas of further research were identified. The study provides a clearer view of major issues related to the field of sales training effectiveness for business organizations, policy makers, practitioners, researchers, and academicians.

Keywords: **sales, sales training, sales effectiveness, businesses performance, literature review, effectiveness, evaluation, conceptual**
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To function effectively in the current and the future marketplace, investing in sales training is a sensible practice for improving bottom-line results (Crane et al., 2005). Dynamic market enforcing organizations take aggressive approach relational to sales training to update their personal knowledge and skills. Salad and Stagl (2009) viewed sales training as a mechanism for producing cognitive and behavioral learning outcomes. Fifty years of sales training has witnessed tremendous growth, with the last decade being a witness to fast growth. Dynamic technological advancements are forcing organizations to restructure sales training and for this fundamental reason, to break new grounds across the globe, a considerable amount of investments and time were coupled to reinforce sales training programs. Sustainability through skilled sales force serves as the primary rationale for organizations to invest in sales training. However, Arguinis and Kruger (2009) argued that in the present knowledge economy, skills required to maintain a competitive advantage are in vogue. Research in performance evaluations embody an expansive literature. How sales managers evaluate their sales force is an issue of fundamental importance (Chonko et al., 2000).

A performance evaluation of a salesperson is a crucial factor for both theoretical and pragmatic reasons (Barone & DeCarlo, 2012). Performance evaluations are a reflection of past performance, whereas its aspects are all about future i.e. promotion, incentives, reward or termination (Podsakoff & MacKenzie, 1994). Thus, it is important to understand what exactly affects these aspects in enhancing the effectiveness of salespeople through evaluation, thereby leading to a firm's success. Furthermore, there is a need to understand how sales managers evaluate the performance of their salespeople as it is obviously correlated with salesperson productivity and, consequently, with organizations' prospects for success. However the top management usually finds evaluation results being too theoretical, unable to provide meaningful information for strategic decisions. Moreover, little attention has been focused on sales training evaluation practices and transfer being multifaceted often without criterion; and often, sales training does not measure

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the potential benefits (Johnston & Marshall, 2008). In light of these aspects, the focus of our literature review centers on performance and effectiveness (evaluation) aspects of sales training. In this review, we have focused on past three decades of sales training evaluation research published from 1982 to 2012, and our review is selective and descriptive. We have focused significantly on post training aspects - the performance and transfer of sales training. Training is a learning process that not only develops temporary skills; rather, it brings out a permanent change in the mindset, behavior, and the ability of the salespersons, and motivates them to acquire new skills for better and sustainable performance (Singh , R., & Singh, R.K., 2010).

Theoretical Developments

Sales training has been cited as a useful and effective intervention to improve performance of the sales force (Katzell & Guzzo, 1983). Sales training is primarily directed towards teaching selling processes to inexperienced salespeople in a relatively short time, the skills of the more experienced members of the sales force (Weitz et al., 1986). Sales training facilitates understanding of "selling practices," which also supplements learning by activities, experiences that emphasize on skills, and acquisition of knowledge aligned to organizational goals. Evaluation certainly ensures that sales training fulfills organizational needs within existing resources and culture (Goldstein & Buxton, 1982). The purpose of evaluation is basically to identify existing value, quality, and contribution of sales training to justify training investment decisions and to formalize future improvement (Kirkpatrick, B. J. D., & Kirkpatrick, W. K., 2011). Training evaluation literature conveys that training outcomes are multi-dimensional, and thus require multiple criteria to be evaluated (Landy, 1989).

The training evaluation practice framework has been provided by Kirkpatrick, and is known as Kirkpatrick's evaluation framework having an acronym 'TKM' (The Kirkpatrick Model) having four levels - reaction, learning, behavior, and results has been popular and is an adopted framework in training evaluation. These levels of TKM are viewed as contemporary thought in the evaluation area. Kirkpatrick (1959, 1960) suggested that behavioral and results measures are useful external indicators of actual knowledge transfer. Ironically, much focus was on internal measures (Alliger & Janak ,1989; Saari et al., 1988). Kirkpatrick (1960) suggested that behavioral and results measures are useful external indicators of actual knowledge transfer, however, he emphasized that all four levels should be measured i.e. training must be evaluated at all four levels, as these levels are interrelated to properly assess training effectiveness. A fifth level of evaluation was added through contributions of Phillips (2003) who incorporated return on investment (ROI). ROI was related to financial outcomes of sales training against cost of training (Phillips, 1996). Studies show that ROI is conducted for around 10-20% of all sales training (Lilly, 2001). Earlier, most sales evaluations were related to sales volume measures, although a shift is now taking place toward relationship selling behaviors (Barksdale, 2000). Kirkpatrick's four-level model is commonly accepted by academics, whereas Phillips's (1996) model finds acceptance in organizations (Bates, 2004). Nickols's (2004) contribution of five main purposes of evaluation is regarded as a directional pathway towards designing evaluation, while Kirkpatrick (2007) stimulated new insights on determining “Return-on-expectations" (ROE), and emphasized that training begins with an end result in mind (Kirkpatrick, 2007). Further, he proposed replacing ROI by ROE as emphasized for tying training initiatives to organization mission and thus, determining the extent to which the degree of expectation had been met (Kirkpatrick, 2011).

Hung (2010) provided a guide for training professionals, which aids in decision making i.e. which evaluation level can be implemented as a priority. Stein (2011) recommended sales training to be timely, relevant, realistic, reoccurring, and robust. Strategic training approaches such as active and action learning, on-the-workplace and just-in- time training, lifelong and self-directed learning are all being currently explored. The next advancement in sales training would be customization and delivering of virtual and mobile sales training modules matched to and accessed according to each individual's needs.

Performance Evaluation in Sales Training

Performance evaluations of workforce are most frequently addressed issues (Cascio & Aguinis, 2008).Research in performance evaluations embodies an expansive literature. The literature suggests that sales training could increase sales force performance as it reinforces critical behavior and learning orientation (Walker, Churchill, & Ford, 1977). The 'performance' is referred to as a process which emphasizes the skills required for completing job specific tasks as

per procedures. How sales managers evaluate their sales force has been an issue of fundamental importance (Chonko et al., 2000). It is necessary to understand how practicing sales managers evaluate performance of their salespeople as it is correlated with salesperson productivity and, consequently, with organizations' prospects for success. The performance evaluation of a salesperson is a crucial factor for both theoretical and pragmatic reasons (Barone et al., 2012). Thus, it is important to understand what exactly affects these aspects in enhancing the effectiveness of salespeople and, thereby, firm success.

Performance evaluation is a reflection of past performance, but its aspects are about future organizational value supplemented with promotion, incentives, reward, and also termination (Podsakoff & MacKenzie, 1994). In a nutshell, the purpose of evaluation is a self-correcting process to enhance knowledge, skills, and an ability to improve work performance, thereby increasing organizational value. Nevertheless, performance evaluation is crucial to ensure sales training effectiveness, which also leads to improved future sales training (Spitzer, 1999). Martin (1957) categorized training evaluation measures as internal or external. However, Kirkpatrick's four-level model is commonly accepted by academics, whereas Phillips's (1996) model finds acceptance in organizations (Bates, 2004). A fifth level of evaluation was added due to the contributions of Phillips (2003), who incorporated return on investment (ROI). Nickols (2004) revealed the differentiation between evaluation and measurement, although his contribution of five main purposes of evaluation is regarded as a directional pathway towards designing an evaluation strategy. All levels were not being measured; while ASTD researchers strongly backed notions that sales training required to be evaluated more at levels three and four, Baldwin and Ford (1988) suggested directions for future research after comprehensive review. Grossman and Salas (2011) used Baldwin and Ford's model to identify factors relating to trainee characteristics, design, and the work-place that exhibited consistent relation with transfer of training/learning. It has already been found that trainee characteristics are crucial in learning transfer (Burke & Hutchins, 2007) ; self-efficacy being significantly linked to both training motivation and outcomes (Colquitt et al.,2000), and cognitive ability does influence training outcomes (Burke & Hutchins, 2007), and positive relationship exists between self-efficacy and transfer (Blume et al.,2010). Further motivation to learn emerged as an integral trait to learning transfer or training outcomes (Baldwin et al., 2009), while supervisor support also emerged as a considerable indicator of learning transfer (Blume et al., 2010). It's already been perceived that organizations should initiate evaluation during the process of sales training rather than wait for completion of the formal sales training (Salas & Cannon-Bowers, 2001). Concordantly, lack of learning reinforcement following the sales training obviously fails to produce effectiveness and value for an organization. However, the evaluation of training outcomes is a complex and difficult process. Therefore, organizations must enhance the professional evaluation capabilities of the HR staff or employ specialized external agencies and focus on goal, objective, and performance related training-learning pedagogies while conducting performance evaluation. Thoughtful approach and professional knowledge on sales training evaluation have been inadequate, which dramatically cause multifaceted difficulties during training evaluation. We perceive that HR personnel responsible for evaluating training are not competent enough in assessing behavioral changes and performance; thereby, exploration of innovative approaches is the need of the hour.

There also exist several additional perspectives on training evaluation. According to Bramley and Newby (2007), instructional systems design process segregate evaluation as formative and summative, where formative (internal evaluation) method judges the worth of training during the training process, which is eventually helpful in anticipating trainer/instructor effectiveness, and the same also effectively evaluates the training design, while the summative (external evaluation) method judges the worth of training only after the completion of training, which measures TKP's levels 3, 4, and 5, and thereafter addresses the outcome or results. The accountable relevance of evaluation research were identification of five main purposes of evaluation, feedback (quality evaluation), quality (cost economics), research (mission), intervention (critical skills), and dominance (manipulation). Kirkpatrick (2011) strongly argued that its impossible to mathematically calculate outcome/result of performances. Its obvious that analytically, it is difficult to segregate the impact of sales training from an organizational financial result. ROE might be practical and feasible to indicate successful training, i.e. the expectations have been met. Henceforth, by replacing ROI by ROE, it would be possible to determine the degree of expectations met (Kirkpatrick et al., 2011).

Transfer of Training

Since a long time, researchers have been dealing with the 'transfer problem,' trying to uncover various aspects,

ironically, inconsistencies have always existed. Thus, organizations find it difficult to understand crucial factors. Using Baldwin and Ford's model, Grossman and Salas (2011) identified that factors relating to trainee characteristics, training design, and the work climate indicate significant relation relative to transfer of training, while self-efficacy related to transfer of training is defined as the salespersons' ability to execute a job task (Bandura, 1982). Presently, trainee motivation emerged as a significant contributor to transfer (Baldwin et al., 2009). Motivation levels can be influenced through intrinsic and extrinsic rewards, which subsequently leads to increased salesperson performance (Jonathan et al., 2004). Conventionally, sales evaluation and incentives are primarily influenced by the percentage of sales target achievement only; although, recent evaluation leverage additional rewards for relationship selling behaviors (Boles et al., 2000), customer satisfaction, and retention (Peppers & Rogers, 1997).

In a study, Tziner et al. (2007) found that motivation to learn was a significant contributor to training outcomes. Helie and Cousineau (1998) suggested that learning can be divided into general task-related components and stimulus-related tasks, which can best be explained by the model of partitioning. They further proposed decomposition of skills where performance can be improved either through decomposing exposure to stimuli or exposure to tasks. The competencies or skills are segregated in general proficiencies category, which are easily transferable to new situations (Hillstrom & Logan, 1998). Therefore, it has been perceived that vigil on transfer of learning must be relational to longer duration in order to reveal promising impact of sales training (Haider & Frensch, 2002). However, the effectiveness aspect of sales training is no longer considered a vogue. Reasons are several, industry reports state that in a billion-dollar sales industry, 90% of all sales training fails (CSO Insights, 2010), and only 59.4 % of the salespeople meet the allotted quota, and that too, at a discounted rate.

McKinsey, trusted and pioneer global management consulting firm in March 2010, in their global survey results mentioned that organizations around the world have spend nearly $100 billion per year to train their employees, and only a few handful of the workforce had acquired or applied job-work related skills and competencies in their routine tasks. Further studies question the effectiveness on the pretext that only 10 % of the sales training expenditures actually transfer to the job (Georgenson, 1982). Moreover, Rummler (1995) undermined the position that classroom sales training (real or virtual) is appropriate for 15% of the developmental needs. In a nutshell, despite consistent, regular, and periodic sales training interventions, many organizations fail to develop the skills of their workforce (IBM,2008). In light of these developments, Miller Heiman Sales Best Practices Study in 2012 provided insights that the core competencies of salespersons need to be effective.

Inconsistent and Unexpected Findings

A paucity is noted for research concerning sales training evaluation practices by several scholars. However, little attention has been devoted to training evaluation practices (Landy, 1989). Literature has limited evidence of systematic evaluation of training (Kirkpatrick, 1968; and Saari et al., 1988). In the area of training evaluation research, Landy (1989) observed some unplanned studies where definite conclusion has not been consolidated. Most of the evaluations were related to trainee's reaction only (Alliger & Janak, 1989). Saari et al., (1988) observed that easy methods were used frequently, such as form filling exercise by participants and feedback by supervisors or managers. Sugrue and Rivera (2005) reported training evaluations statistics as: for Level 3 & 4 as between 4 - 8%. Ironically, the levels of highest importance are often neglected. ASTD researchers are of opinion that sales training is required to be evaluated at levels three and four. The general notion among scholars is that evaluation of training is important, however, Kirkpatrick's level three and four are often neglected.

Some of the studies use easier approach such as yes/no responses to conclude findings. Model of Kaufman and Keller (1994) based on TKM argues that Kirkpatrick's model has been positioned for evaluating training only, and now, there is a need for an advanced and proactive model. Many research questions have been targeted towards financial outcomes, but lack empirical data to provide justification (Acemoglu & Pischke, 1999). A significant constraint has been the use of only Level 1 to assess training output (Ham, 1994). Moreover, self-reporting methodology has been the dominant factor over behavioral observations (Phillips, 1990). Blume et al. (2010) said that the learning transfer literature having mixed findings, and also lack empirical evidences. Transfer of training is a vital constituent of the sales training process, and despite of this fact, transfer of sales training remains a subject which has not been researched thoroughly. Jacobs & Washington (2003) suggested that there exists a relationship between individual development and organizational performance, and not a single study has projected a clear-cut relation

between employee development and organizational development. In the previous four decades, "training evaluation" and "learning transfer" have never been effective and primarily used for theory development (Wang, Dou, & Li, 2002).

New Insights to Carry Forward

Researchers should pursue topics that are of high importance to practicing managers. Training evaluation literature conveys that training outcomes are multidimensional, and thus require multiple criteria to be evaluated (Landy, 1989). Conventionally, much focus was on internal measures by organizations (Alliger & Janak, 1989). Underutilized theories should be employed more regularly (Marshall & Michel, 2001). Also, research can be aimed to connect individual level outcomes to firm level performance. We perceive that organizations are interested to measure organizational level outcomes than measuring knowledge transfer, or transfer of learning could be the best indicator among Kirkpatrick's four levels of evaluations. Although one cannot measure business impacts since numerous variables are involved, but level four is considered as the most tangible (Goldberg & Ramos, 2003). Inconsistent and unexpected findings of models in existing published literature may be insufficient for studying the transfer process. Rainbird (2000) argued that the primary purpose of the workplace is not learning, but to perform sales and services, and ,therefore, organizations may not provide sufficient resources for learning, as opposed to working. In an era when majority of the formal and informal training activities still involve the transfer of learned behavior, we should give significant consideration to the functional role of sales trainees. This indicates that there may be few essential but hidden variables we need to target. Normally, trainees have the privilege to choose what to transfer (regardless of any learning approach), and individual intentions become more significant.

Attitudinal studies also have conflicting findings. Keeping this as a reference, we might have ignored one important attitude, i.e. attitude towards learning transfer behavior. Holton et al. (2000) said that work attitudes might be related to learning transfer behavior. Trainees' attitude towards the learning transfer behavior should be relevant while explaining transfer behavior. The variable 'self-efficacy' is treated as a robust motivational variable (Bell & Kozlowski, 2002 and Wood et al., 2000). According to Ajzen (2002), behavioral intention probably is the most influential variable which predicts specific human behavior. Krueger (2000) argued that individual trainee and contextual variables exert an influence on a specific behavior through behavioral intention, henceforth, the same is not directly linked to the behavior. Incorporating multiple factors into training programs might not be financially practical for many organizations. The challenge lies in maintaining a balance between technologies and the personal touch needed to sell effectively, through sales training.

Conclusion

Sales training augments or supplements learning, which emphasizes on skills and knowledge acquisition in direct support of performance goals. Sales training serves as a powerful tool for producing the targeted cognitive, behavioral and affective learning outcomes essential for survival (Salas & Stagl, 2009). Stein (2011) recommended sales training to be regular, relevant, realistic, and reoccurring for having a competitive advantage and high organizational value. Learning orientation has a positive impact on firm performance (Farell, 2000). Sales managers who are effective in coaching consistently deliver more value to their organizations. The goal of sales training is to master the required competencies so as to apply them to their day-to-day routines (Noe, 2008). Sales training should not be considered as a one-time affair that rarely produces results, rather, it should be a process which consumes a significant portion of their time. An effective sales training approach should focus on imparting best behaviors and practices for enhancing organizational value, preferably through an interactive way, followed by reinforcement and evaluation which of course needs a considerable amount of time. During the last ten years, development of sales management systems is probably one of the greatest happening in the business circuit that moved sales training from the realm of art to that of science, which also calls for consistent improvements. Now onwards, sales training activities should take on the role of educating, informing, instructing, and developing the sales team, using real world scenarios currently being experienced by the sales force. Training helps in achieving the end result by performing tasks effectively to sustain and survive using a systematic pathway, and training is integral to knowledge acquisition and development of skills and learning from the past events and activities (Singh et al.,2010).

Sales or selling in any organization is considered as a pivotal function that generates revenue to ensure

sustainability of all organizational activities. In the present buyer driven market, the selling process indulges in a lot of technologies, hence updating themselves and their knowledge as per the current trends is essential for sales people to cope up with the latest technological advancements. Also, to incorporate training for higher management executives, the message automatically conveyed to the middle and lower management staff is that training is essential. Research can offer guidelines for practitioners and professionals on how to analyze, design, develop, implement, and evaluate sales training functions.

More research is needed to empirically verify frameworks to evaluate whether sales training has been effective in achieving organizational goals. Thus, clear-cut understanding is required to be gained about how a sales training program works, which can thereby enable top management to set priorities. Today, there is a need to explore the underutilized domains such as highly complex social networks involved in contemporary selling. In an era of dynamic advances, organizations must be flexible for making adjustments to remain competitive. Finally, sales training effectiveness can be enhanced by developing a culture where focus is concentrated on critical skills, key competencies, and sales force development to drive the business forward. An organization has to ensure that it extends provisions and resources to build core skills, significantly ensures that training gives the feel of a strategic session to pierce new accounts, and to convert training results into sales figures.

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