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An Insider's Guide to Choosing the Right Sales Training Partner

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THIS MAY SOUND FAMILIAR…

You're attempting to vet a few training providers, and as you navigate the process, you realize that choosing the right firm is far from easy.

Way too often, learning leaders fail to get what they want because there are a lot of intangibles. And honestly, the training providers are better at selling their solution than most learning professionals are at buying the best solution. They are not only sales experts (as they should be), but they've been through this process hundreds of times.

How Many Times Have You Vetted A Training Provider?

It's difficult to know what you are really going to get until it's too late.

The sales training industry is known for being great at "dating," but not very good at "marriage." You meet with top people on the front end who always say the right things, but after money changes hands and the "ring is on your finger," learning leaders are often left feeling a little duped.

To "marry" the right partner, it's critical to know exactly what you need, understand the unique expertise your potential partner must possess to serve you well, and implement the right process that will reveal if they hit the mark.

Let's start with the end in mind – What do you really need?

What Are You Really Buying –Change or Content?

The first question you need to answer is:

Where do I really need outside expertise? Do I need to just buy content, or do I need a partner who can help me drive change?

This decision determines how you assess your potential partner.

If you aren't crystal clear on what you really want, it's easy to get distracted and overwhelmed by all the elements involved in launching a training initiative.

If you need both, it's helpful to decide what's more important. Therefore, you can hone in on who you should work with: the company that has the best content or the company with the expertise needed to transform your sales organization. If they can deliver both, then your job is easy.

The key is to make sure you stay laser-focused on the outside expertise you need most to reach your desired destination.

Buying Change

If you are buying transformation, your decision criteria should focus on much more than a program. In a nutshell, your criteria should center around both process and people.

What's their process for driving change?

You know that change doesn't happen in a workshop.

To see the sales results you desire, tune in to how your potential partner defines the road to success. Here are a few questions to help you determine if they have the right process in place.

"Once we hit the go button, can you provide a month-by-month plan for the next year?"

If they can't easily articulate or share a detailed plan, they don't have one.

"What role does our leadership team play in the process – front line and senior leadership?"

If all levels of leadership don't understand and/or embrace their role in driving change, training initiatives will have limited impact. Your partner should demonstrate that leadership is key to change and therefore ensure they are an integral part of the process.

"How do you set us up for success so that we are no longer dependent on your firm?"

You need a firm that will "teach you to fish," not one you have to keep paying to "fish." If, due to limited resources, you need the outside firm to do the heavy lifting for a season, then that becomes part of your criteria. But a partner who is focused on driving change knows that they eventually need to empower you to lead the charge yourself.

"What are the critical elements/principles of driving change in an organization?"

The firm should have solved this equation and easily articulate their philosophy, best practices, and principles related to driving change.

"How will you measure change in four areas – desire, productivity, capability & results?"

Desire, productivity, and competency are the dials that drive results. To ensure you can accurately determine the barrier(s) to results and keep your organization focused and brought into the change initiative, you must measure in four dimensions.

Will They Dedicate the Right People?

When vetting a firm, most learning leaders focus on the wrong word. Buyers tend to focus on "what" and not "who."

Who will be doing the work is far more important than what deliverables are offered. Most training providers will state they can assess your organizational needs, customize the program, and build you a unique sustainment plan. For all of the above to be effective, you need to work with the "A" team and not the "B" or "C" team. In other words, you don't want the most critical work staffed out to a junior associate.

Additionally, you want to know who will be working with your senior leadership team. If they don't have the presence, expertise, and confidence to lead and challenge your leaders, the project will fail.

Beyond the typical resume intel, here are a few questions to help you vet the people:

- Who created/authored your transformation process? Are they still involved with your organization?"
- "Who, specifically, will be assigned to _____ (e.g., develop our sales process)? Tell me about their experience level."
- "Who will work with our senior leadership team? Will we meet them before we move forward?"
- "We feel comfortable with _____ (the person you met during the courting phase). Will we work with them?"

Buying Content

If you are primarily looking to fill some holes in your program library, or you have the engine and expertise needed to drive the transformation process (and therefore just need a specific program), think about your objectives in three areas: knowledge, desire, and/or skill.

If your primary objective is knowledge transfer

Bridging knowledge gaps (e.g., sales process, assessing an opportunity, business acumen) is more about leveraging the latest digital learning tools, as well as the potential partner's expertise related to the learning objective (e.g., developing value propositions for a specific product or solution). A workshop may be needed to ignite the learning process or be the most efficient way to ensure alignment, but knowledge can fairly easily be transferred by leveraging the latest tools.

If this is your primary goal, this is the easiest category to determine the best partner. In most cases, demo-ing existing tools or programs will reveal the best partner. But the following questions will be helpful in that process:

- What apps/tools do you offer to teach or reinforce the learning? Is AI leveraged to improve learning? Can it be customized?
- Do you have expertise in ______ to create custom content?
- What's your philosophy in driving learning when building a module (e.g., problem-based learning)?
- What's your process to develop a custom program? Who will we work with?
- Do you break down the content into microlearning modules (for just-in-time learning), or is it one continuous program?
- How do you measure and improve the program(s)?
- How is the content integrated into the seller's existing systems and processes (e.g., embedded into the CRM)?

If your training objective is to develop skill and spark desire:

If your organization is focused on sales transformation, the most effective and efficient way to ignite the skill development process and ensure sellers embrace the need to change is by conducting workshops. Whether delivered virtually or onsite, this requires a radically different expertise.

The ability to create content and a learning experience that will inspire change and launch the skill development journey is a far different capability than bridging the knowledge gap. Think teaching someone to label the keys on the piano vs. learning to play the piano... and they aren't too crazy about the idea of playing a new instrument.

In addition to the typical questions related to design and structure of the program, here are a few additional questions that will help you determine the partner with the best program, best workshop experience, and ability to sustain the program.

"How do you address each unique sales role?"

There are eleven different sales roles. Most programs were built for one type of seller. Make sure your partner understands the unique challenges of the role(s) in your organization.

"Do you focus on teaching competencies, or do you have a unique methodology?"

A methodology is a vendor's proprietary approach to addressing a very specific challenge, and therefore, by design, limiting. This can be effective if you are singularly focused on one aspect of selling (e.g. discovery framework), but if you need a comprehensive program or to seamlessly integrate new content into your existing library, a methodology can be problematic.

"What's your approach to ensuring participants embrace the need to change?"

Pay particular attention to their creative approach to engaging (virtual) participants in the areas where you believe they will encounter the most resistance. Picture the most resistant seller and ask yourself, "Will this work on X? Is the program effectively demonstrating why it is in X's best interest to change?"

"What's your underlying sales philosophy?"

The key here is alignment. You don't want to hire a company that has an aggressive approach if you are a customer-centric organization. For leadership to buy in and reinforce, the philosophy needs to align with your culture – not the ideals plastered to the office wall, but the real values that drive behavior.

“What percentage of exercises and examples will be customized?”

If the program is 95% relevant to the participants, they will focus on the 5%.

How is delivering a virtual workshop different than a workshop delivered onsite? If the plan is to deliver the program virtually, inspect the partner’s process and tools for keeping the participants engaged. This is a very different medium for training and requires a **completely different process.**

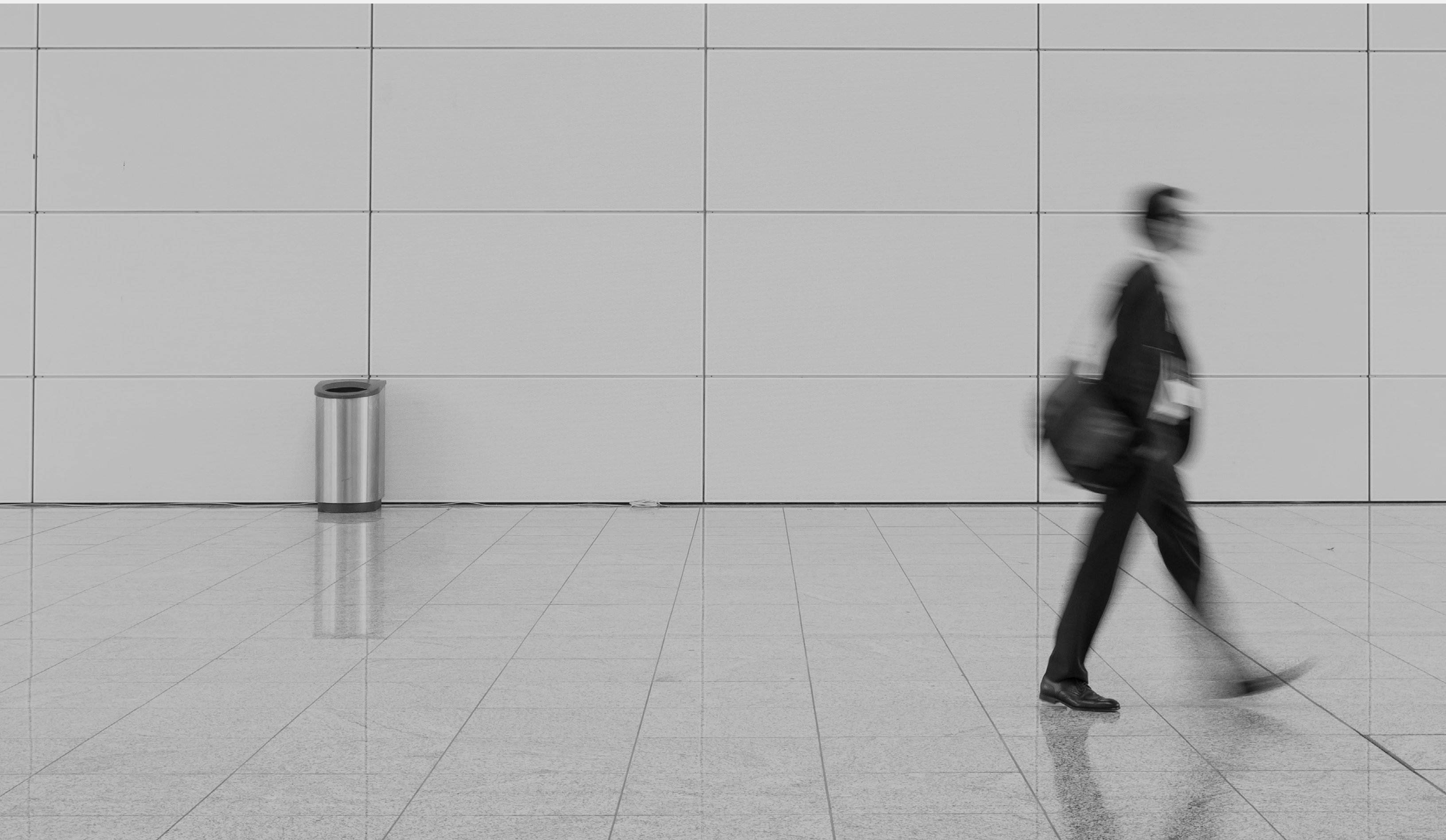
“Can we meet the facilitators prior to launch?”

Don’t hire a singer if you haven’t heard them sing. A good partner will ensure you are 100%comfortable with your team before you encounter risk.

“How do you equip our coaches to reinforce skill development?”

Developing skills requires ongoing coaching and practice. Therefore, your front-line leaders need diagnostic tools, skill development activities, resources to teach and reinforce new content, and ongoing support to lead the charge.

Bottom line, your front-line leaders need to be front and center when developing your transformation strategy.



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STEP 1

1. REQUEST A PRELIMINARY ASSESSMENT

What you want and need is a recommendation, not a presentation. For that to occur, your short list of providers needs information. Therefore, allow them access to a few reps and managers, as well as a preview of existing content, resources, and all relevant processes.

This step allows you to ultimately assess (see Step 2) their expertise, ability to adjust their approach to your unique organization, their passion for serving you, and how your front-line people (the ones they will serve) feel about the potential partner.

If this is primarily a change initiative, ensure the vendor has an opportunity to interview a few key stakeholders as well. These informal meetings will be very revealing for both parties.

You may be wondering if you should pay for their time - the answer is no. The vendor who will become a true partner should be willing to do everything possible to eliminate risk from the process. The more you know, the better decision you will make - and that should be their number one concern. Plus, if they are angling for a paid sales call, they either aren't very confident in winning or aren't that interested in working with you.

STEP 2

2. ASSEMBLE THE TEAM FOR PARTNER RECOMMENDATION

Here's where you need to allocate the right amount of time and resources: spend 2 to 3 hours, depending on the scope and importance of the initiative, with the finalist. While this will cost you a day, it will guarantee that you make the best decision. The last thing you want is to roll out a flawed training or change initiative for the most vocal people in the company.

Instead of a surface-level overview of what the firm offers, this time will allow the vendor to share their assessment of your organization and their recommended solution, while also providing an opportunity to double-click on any deliverable that interests you and remove any ambiguity.

Beyond time, another critical element of this step is to ensure the sales leader and person funding the initiative (if different), is present. Bottom line: the best person to communicate the recommended solution, and the ROI, and answer the toughest questions, is the potential partner.

If you are passionate about the project and want to ensure it doesn't get replaced by a competing priority (or all your hard work is wasted by an unqualified vendor who just happens to be a close friend of the CXO's spouse), involve the key stakeholders.

STEP 3

3. REVIEW THE FINAL PROPOSAL

As part of the initial vetting process, you most likely will ask for a proposal. But without more intimate knowledge of your needs, this serves more like a menu of costs than an accurate statement of work.

But with steps one and two completed, information is now available to make decisions about deliverables and develop an accurate and final statement of work, eliminating any surprises. In addition to asking for a final proposal, request a meeting to discuss the SOW. Even if you don't have questions about pricing and deliverables, this is another chance for a few off-camera interview questions.

STEP 4

4. CONDUCT A PILOT

Lastly, conduct a pilot. Again, the size and complexity of the training will determine what makes sense here, but build the opportunity to go on at least one "date." Whether it's a small portion of the initiative (e.g., building a sales process), delivering an abbreviated program, or the entire program to the leadership team, never make a major commitment without first "tasting the food." Think temp to hire.

You may even choose to have the two finalists deliver a pilot and base your final decision on the best-performing organization.

Regarding compensation for the pilot, that depends on the size of the pilot and how much of an investment of time you are asking the potential partner to make. Remember, a very competent

firm is using this opportunity to interview you as well. If you appear to be angling for a win/lose, a good firm may exit from the process.

One More Thing...

On a final note, pay close attention to how they sell you. Do they practice what they preach? If you are hiring a sales training company, they should be experts at their craft. Ask yourself, do I want my team to sell like I was sold to? If not, this may be the best indicator of all.

Bottom line, time is the key. It is possible to remove all the mystery and know what you are getting. Just go on a few more dates. Ultimately, motive, expertise, and potential fit will be revealed. If you are interested in more information on ASLAN which has been training Inside Sales reps since 1996, you may want to check out our **Virtual Selling Skills** Program, our **Assessing a Large Sales Organization** or any of the other **11 programs offered.**