

## SCOPING SALES CAPABILITY (OR TRAINING NEEDS ANALYSIS)

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### Client Requirements

- Design training programs with immediate impact on performance
- Obtain a cost-effective return for the investment in training and development
- Provide customised programs for individual training needs
- Build confidence and commitment to a training approach which works
- Install clear linkage between day-to-day operations and training of all sorts, including coaching

### Typical Scope

At **harrison consulting**, we believe that Training Needs Analysis (“TNA”) is the starting point for effective training, and follows the steps shown in the diagram on the right.

Provided that job descriptions are specific in terms of tasks and performance standards (or KPIs), then the job competencies (knowledge, skills and attitudes) can be detailed.

The next stage is to “benchmark” each individual against these competencies, via the important people management mechanisms of observation, coaching and performance appraisal.

Once the training gaps/needs are clear, priorities can be set and training programs designed.



### Possible Project Methods

Many clients ask us to conduct their training needs analysis in full, which usually requires most, if not all, of the following activities:

- Review of position descriptions, key tasks and performance standards
- Direct advice on job competency requirements
- Detailed interviews with line managers, less structured with other managers
- Review and analysis of coaching records and appraisal forms
- Workplace observation or in-field accompaniment (sales people)
- Development of consistent and comprehensive formats for tna
- Provision of consulting report, covering TNA and related issues

Other clients prefer to conduct the analysis via their own management teams. In such cases, we are employed to provide supporting tools and templates, and perhaps to validate the results obtained. Please see the case study on the next page.

## CASE STUDY

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A major confectionery company employed a large sales force to service two parts of the supply chain, namely Key Accounts and Supermarkets (“grocery”) and traditional outlets (“route”). Before designing the integrated training programme which was required to lift competitiveness, a detailed training needs audit was conducted, covering four key positions:

- Traditional representative
- Traditional supervisor
- Grocery representative
- Account executive

Based on the recently revised job descriptions for each of these four positions, thorough “KSA specifications” were compiled. A comprehensive fieldwork programme, supplemented by interviews and meetings with Line Management, allowed us to collate the training needs of these four target groups, and submit detailed recommendations, for a “total training” approach. The result was that a highly tailored and effective programme of training was developed, and installed over a two-year period.

COMPETENCY AREA AND KPIs	SPECIFIC KEY TASK & COMPETENCE	STANDARD	Q1	Q2	Q3	Q4	GAPS OR TRAINING NEEDS	K	S	A	D	R
Communication (internal & external customers)	Active listening	Always		√			Sometimes impatient under stress			√		
	Empathic listening	Often		√			Sometimes impatient under stress			√		
	Responses to encourage communication	Always	√				Good eye contact and "listening noises"					
	Appropriate use of note-taking	Always		√			Sometimes forgets to take notes			√		
	Open & closed ended questions	Always		√			Knows well but does not always apply	√				
	Able to probe in diplomatic manner	Often	√				Very good and gentle style					
	Able to use PEN technique to make needs clear	Often				√	Does not fully understand the technique	√	√			
	Builds rapport and credibility	Always	√				Very credible and excellent rapport					
	Summarises agreements & action	Always		√			Needs to take notes more fully	√	√			
Business-to-Business Sales	Plans time and customer coverage	Always	√				Well organised					
	Anticipates customer key issues and needs	Always		√			Pre-call research needs help & direction			√	√	
	Sets "SMART" call objectives and plan	Always		√			Sometimes a bit vague on objective	√				
	Opens the call and creates rapport	Always	√				Excellent					
	Question techniques for need identification	Often		√			See above - needs help on PEN method	√				
	Uses high value needs/pay-off questions	Often		√			As above	√				
	Shows good Product, VAPS, tariff knowledge	Always	√				Superb product knowledge					
	Able to convert features into benefits	Always		√			Very capable in this area					
	Sells benefits and solutions	Always		√			Yes					
	Presents benefits with proof and literature	Always		√			Some out-of-date literature					√
	Knows how to classify and probe objections	Always				√	Never had specific training on this	√	√			
	Handles objections to create selling points	Often		√			Handles intuitively on relationship basis	√	√			
	Closes correctly, to obtain commitment	Always		√			Uses relationship, credibility and respect	√				

Equally robust projects have been conducted for clients in “B2B” areas such as transport, chemicals, paper, and packaging; and in retail and service industries. In almost all cases, these projects were followed by the design and installation of customised training programs. A separate backgrounder is available on the Harrison Consulting approach to such integrated training projects, including the role of video support, coaching mechanisms and performance assessment.