



Training a Remote Sales Staff

By Brian S. Wallace, Director of Training,
Silver Hill Financial LLC

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Editor's note: This article is the second in a series by Brian S. Wallace.

“My sales staff is scattered across the country,” the regional manager said to the training director. “I have offices in Boston, Chicago, Dallas and San Francisco. We are in three different time zones. How do I get the message out?” All around the country, this question echoes from the offices of national sales managers, area sales directors, human resources managers and CEOs.

What is the answer to this complex and potentially expensive training question? It is found in the realm of cyberspace—*e-learning*. How do you get started? This article will take you through the steps for setting up an e-learning initiative in a mortgage company. We will walk you through the initial thought process to a successful implementation.

Picture this setting: Your company is ready to roll out a new Sales Process Management System. This system will change your business by streamlining processes, eliminating unnecessary procedures, cutting paperwork and improving pull-through by 30 percent. In addition, it will generate millions for your company in the next few years.

There is just one major problem. Every salesperson will need to be trained to use the system before implementation can begin. Do not fear! Your organization has a training department, and that's what those folks do anyway, isn't it? So, you notify the training

director of your needs and ask for the training solution. However, there is one other key factor that plays into this mixture. This system needs to roll out before the end of the quarter, so you will need to train 2,500 salespeople before that time.

After the training director regains consciousness, you learn that it will be no problem because the department recently implemented an e-learning platform, and this is a perfect chance to try it out. Even with such short development time, all affected employees can be trained. You begin developing online training modules that the users can access anytime from the convenience of their desktops, laptops or even PDAs. In our story, the company was smart enough to see the benefits of an e-learning platform before the need existed. Now, the tool is available and ready to meet the needs of senior management.

In fact, senior managers have always complained about the development time the training department needs to implement a successful training program. Most managers ask for training the day they need it. Typically, the training department responds, “Can we do it sometime next week?” Management's typical reply is “no.” Unfortunately, the department needs at least 90 days to formulate a plan, schedule training space, order manuals and develop a stand-up presentation.

In the last few years, e-learning platforms have come a long way. Acronyms such as LMS, ILMS, ELMS and LMSI abound in the world of e-learning. Selecting a vendor takes time, patience and focus. Although most vendors appear to offer the same product, your company will benefit greatly when you dig a little deeper into vendors' learning tools and really discover what they can do for you.

The first step in developing an effective e-learning initiative is to formulate a plan. This is probably the least exciting and most painful step; however, it is the most profitable at the end of the search. Planning should consist of several steps. First, make a simple list of the items you want your platform to do. Ask yourself, “In a perfect world, what would this system do?” Record those answers in a matrix. Second, simply ask your colleagues, IT managers and other training professionals what they have heard about e-learning companies or even for the name of the one they currently use. Just by asking, you can attain useful information on today's vendors, such as their reliability, ease-of-use, support and poor functionality. Be sure to record this information.



After your initial research, you should have a list of possible vendors and the functions you would like to see in your system. Most of the platforms available in today's market focus on a complete Learning Management System (LMS), which allows you to manage your company's training. With this system, you can manage anything from class schedules to content management.

If you are going to be producing your own content (which most of us do), the assembler tool is also very important. It gives you the ability to create training modules and publish them on your site. In my opinion, the assembler tool was the one feature that made or broke a vendor in the selection process. If the assembler tool was too difficult to use, then I immediately removed the vendor from final consideration.

High-tech, interactive online modules are what people want. Vendors in today's market will create that type of content for you, but it comes with a price from \$100 to \$300 per hour. Needless to say, it is beneficial for most companies to create their own content, which can still be appealing to the end user. Let's face it, if it's not fun, the user will not participate. The ability to add Flash technology is very important, but your assembler tool should also be able to create a basic training module for today's literate computer user.

The next step is very important. Before you speak with a vendor on the phone or via e-mail, do some research on the Internet. By looking through vendor Web sites, you can discover a plethora of facts about a company. Take advantage of online demos and pages with frequently asked questions (FAQs). Review the FAQs to see what customers are struggling with. Reserve several hours to surf the Web for information.

Now that you have done the research, it's time to make some initial phone calls. Your original list of possible vendors probably features about a dozen. I suggest that you cut that number in half to make it manageable. After some exposure to company Web sites, you should be able to cut the list down with minimal problems. Make some calls to the vendors and explain your situation. Most companies will suggest that you go through a live online demo with the salesperson. I agree. This is time well spent. During this time, assume the role of a new user and evaluate the system's ease of use as well as the level of support the company is willing to provide.

After you have spent some time online with each of the vendors, make an additional cut. At this point, you should be able to narrow your list to three final contenders. Request that each of these three finalists makes a personal visit to your site to assess the needs of your company, meet the IT staff and spend time with senior management. This will give you the opportunity to "put a face to a name" and form critical impressions that will inevitably become part of your final selection process. Ask as many questions as possible and encourage others who meet with the vendors to do so as well. After each of the finalists has presented the platforms in a live setting, gather all of those involved in the decision-making process and seek their input. Your finalists will pressure you to make a decision, even offering deals for saying "yes" on the spot or within 24 hours. Don't give into the temptation! Take your time and make the right choice. This is one decision you do not want to get wrong.

So, you are now ready to make your final decision. Chances are that the three finalists were relatively close in price to what you budgeted for the year.

Now it's time to negotiate the best deal you can for your company. All of these vendors have extremely flexible pricing models, and the competition is fierce when it comes to money. For example, when I was setting up my platform, the vendor dropped the price \$500 each week until I made my choice. Eventually, I thought they were going to pay me to use the system! You might even consider asking for a trial period with full rights to the site. If that doesn't fly, try a money-back guarantee or a 90-day cancellation policy. With "perks" like these, the deal will be more appealing to your company and its management.

Most vendors want to price your model by the number of users on the platform. I encourage this feature and suggest that you attempt to enhance it. Ask that your pricing model include only registered users per month, not the number of employees your company has at the time the contract is signed. Chances are that the number of users will not be the same by the time your e-learning hunt is through. If the vendor is priced in tiers, then you will save your company several hundred dollars.

Before you put the ink to the page, take one last look through the contract. Read the fine print and make sure the following questions are answered:

- Will you be able to retrieve your data from the servers upon the conclusion of your contract?
- What happens if the vendor goes out of business?
- Can you negotiate further discounts if you sign for subsequent years?
- What type of support is offered with your contract?
- Will the vendor provide training on how to use the system?
- What is the number of allowable developers per number of paid users?
- Do you have the ability to import modules purchased from other vendors without incurring additional costs?

Training a Remote Sales Staff

Congratulations! You now have a powerful tool that will take your training efforts well into the next generation. If you've made the right choice, the e-learning platform will go with you.

Brian S. Wallace is Director of Training for Silver Hill Financial LLC, located in Coral Gables, Florida. He can be reached at: 305-646-6478 or toll-free at: 888-988-8843. Fax: 305-646-4732. Additional information on Silver Hill Financial can be found on its Web site: www.silverhillfinancial.com. ♦