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Cartelligent Sales Training Program

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Multidisciplinary Science

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Abstract

My Capstone project is based on creating an entirely new sales training program at the company I work for, using collaborative and innovative approaches, and for the first time in my company's twenty-two year history, including stakeholders that range from the Executive Team to the newest members of the sales team.

Keywords: Collaborative, Innovative, Comprehensive.

Introduction to your Capstone Project

My capstone project was based on revising the sales training program for the company I work for. Thirteen years ago when I joined the company I went through what they believed to be a sales training program but in reality was a quick onboarding program. I was promoted to a Team Lead position ten months ago and was surprised to find that we are still using the same sales training program that I went through. The world and technology has changed, COVID led to us having our sales team work remotely including new hires, yet our training approach has not been altered. As I dove into what it is we were doing it became apparent that what we were not doing was leading to high levels of turnover for new hires. Retention amongst new hires is currently only 20% stay beyond a year. I have a deep love for my company and the work we do so revamping our sales training program is important to giving us the best chance of continued success.

Section 1: Innovative Approach

My Capstone was initially based on bringing together our Executive Management Team and key Directors which was a huge milestone as this would mark the first time in my company's twenty-two year history that we had so many perspectives working together on a project. After

receiving feedback early on in the process, I extended the stakeholders to include co-workers and new hires that had just recently been through our sales training program. This was significant as it added a level of perspectives that we would not have originally had, especially if the recent hires weren't included as the feedback we received shifted the course of this project. The project crossed all departments which was easily done since we are a small company with just five departments. Since every department literally crosses every other one it made the most sense to gather perspectives from all departments as the outcome has a direct impact on them.

When looking at how to approach this project creatively and get beyond just a simple Either/Or I had to get to the root of why other innovative ideas had not been successfully implemented. Due to my tenure with the company, I have seen many innovative projects begin, get traction, receive monetary investment, and go absolutely nowhere. These innovative projects were either led by hired outside consultants and firms or driven by internal employees who wanted to see change. These projects would start with large degrees of enthusiasm by our CEO/Founder and then ultimately shift as he is resistant to large changes. This meant the projects would stagnate, the consultants or outside hired creative firms were fired, and the internal employee who led the charge felt defeated and would leave. In speaking privately with a large mix of my stakeholders it became clear that the concept of “psychological safety” was missing from our company. In a study led by Google in 2012 named “Project Aristotle...it found that what mattered most to team performance was psychological safety, or the ability of each team member to be able to give voice to their ideas without fear of reprisal or rebuke.” (HBR, 2018). This led to a dynamic conversation with our newly hired COO. He understood the past challenges and committed to being the gatekeeper of our CEO/Founder so all stakeholders could

feel free to be innovative and speak freely. He also committed to helping ensure the work undertaken in this project would be implemented.

Section 2: Emotional Intelligence

In the beginning of this project I was highly self focused. I was leading this project in addition to leading my portion of the sales team, all while having to generate revenue for my company and my personal finances. It wasn't until the video with Tasha Eurich, "Increase your self-awareness with one simple fix" changed my direction. Her trick of changing "why" to "what" (7:55-13:45) helped me propel my self awareness to a different level. I had been very focused on "why" I wanted to change the sales training program, which when I peeled back the layers, was because the newly hired salespeople would ultimately be assigned to either mine or my co Lead sales teams to manage. Their lack of training meant that my time investment would be significantly greater getting them up to speed then if they had been properly trained. Changing my "why" to "what" was the catalyst to asking "what type of salesperson does our company need to take us to the next level". This led me down a very different path than when I first began.

Along with my lack of self awareness at the beginning of my capstone project I also had not considered the emotional intelligence of my audience. I had begun this project thinking my audience was the stakeholders who included my Executive Team, Department Head Directors, and co-workers. It hadn't occurred to me until we were diving into the project that the true audience and their emotional intelligence included our clients and vendor partners. Backing this up and flipping the focus changed the strategy for who we will hire in the future. Our company has always believed that a quality salesperson can sell anything and that we could train the necessary skills with product and brand knowledge. What we found as we dove deeper into this project, that having a strong interest and passion for automobiles was the one connected piece

that drove success and netted the most referrals and returns from our clients. “Consumers are not just invested in products or services anymore; they are connected to brands as a whole.” (Forbes, June, 2, 2020). Recognizing and considering the audience and their emotional intelligence has completely shifted who we are currently recruiting

When considering the value to others and how their emotional intelligence plays into our overall company it was clear that emotional intelligence has never been something my company considers or values. It is easy to trace how this comes into play as our CEO/Founder whom I admire, respect, and truly like, is often referred to as possibly being on the spectrum and having low emotional intelligence. Recognizing this area as important to include and achieving it are very different things. I began having conversations with my stakeholders regarding this area and sent a few articles including one that I felt was the key to moving the conversation forward and hopefully altering the path of the project. A large takeaway from the article was “while you might excel at your job technically, if you can’t effectively communicate with your team or collaborate with others, those technical skills will get overlooked.” (HBR Online, 03 April 2019). As of this writing, a conversation has started with more work to be done.

Section 3: Creative Thinking

The creative framework of my capstone project evolved as my stakeholder group dove deeper into conversations and what a new training program would look like. It went from implementing the “perfect training program” which is not possible, to creating a better program than we have now. We now recognize that we’ll continue to refine and revise as new hires move through the training program. With each new trainee we will gain additional knowledge and insight into what needs to be tweaked, added to, or enhanced.

During the course of my capstone I found unique ways to approach the project, some of which we have rotated into practice and hope to continue far into the future as we strategize on other areas within the company. I created “Drive Time with Jessica” which was one on one time with my Director of Operations on her way into the office and home. We began with mornings and rotated in evenings later on as those conversations were important to review what has been accomplished and what other areas needed to be included or focused on. Another unique approach which I’ve actually rolled out to my sales team is to take me on a “walk”. There was one important conversation early on with my CEO/Founder and my Director of Operations where they got out of the “box” which was the office and took me on a Facetime walk. This led to a loosening up and generation of ideas, some not related to this project at all. We have done this a few more times and will continue to especially when we’re feeling frustrated or stuck.

Section 4: Your Innovative Solution

The accomplishment of my capstone project is that we have restructured our sales training program from what was really a brief onboarding process into a comprehensive three part program that covers all areas and departments. We had been working under the premise that onboarding and training were the same thing so the focus of our training had been on getting new salespeople comfortable using our internal CRM (Customer Relationship Management) platform. We had come to equate successful completion of sales training with knowing the basics of how to use Salesforce. We now have recognized that our training program needs to be much larger than knowing how to navigate Salesforce. It will be comprised and implemented as follows: Onboarding will last two days, Salesforce training (CRM) will last three days, and sales training which will now incorporate all departments, will last two weeks (or more if needed). The departments included are purchasing, trades, deliveries, and accounting.

The innovation approach to our problem and project came from a brainstorming exercise I had my stakeholders do and was twofold. The focus of the brainstorming was “what would you want a salesperson to know to work in your department.” This exercise was innovative as we have never utilized brainstorming as a way to generate ideas. This exercise gave way to what will become a key part of our sales training program which is metric based tests, given during the training, so we can assess in real time where we need to reinforce or offer additional training before moving the salesperson on to the next department. The second takeaway that was innovative is this exercise led to including cross training in all other departments. Being cross trained will give a higher level of knowledge for each salesperson so they can see in real time how the work they do and instructions they provide to each department affect the work that department does.

Section 5: Results

The benefits to the stakeholders are happening in real time as this project, although focused on future salespeople, made us have real conversations about improvements needed within the sales teams that would make other departments more functional right now. This led to us rolling out and having zoom meetings on areas of concern now along with providing additional training to our sales team regarding sourcing, trade paperwork, and instructions for accounting. I do not have exact metrics but as of last week there had been significant improvement in communication and clearer instructions provided by our sales team which equates to less department starts/stops, having to ask clarifying questions of the sales team, and faster time to complete needed tasks.

The impact to stakeholders is significant as all departments will be able to successfully complete their jobs in less time and with less frustration. Each department being given the full

story will allow them to complete their tasks expeditiously instead of the previous way we've operated which is multiple starts and stops. Being able to complete the assigned tasks on the first round translates into higher productivity and more revenue being generated and collected promptly. This in turn, makes for a more sustainable business model where we can look outward at expansion and growth.

Section 6: Conclusion

This capstone project has shaped a new path for my company that has been doing the same thing for most of the twenty-two years that we've been in business. Although we are implementing a newly structured sales training program, this project has morphed into much more than a capstone. It has opened the door to authentic conversations about dreams for our future, innovative ideas shared by people that normally wouldn't offer suggestions, and reignited the passion of why we chose to work at our company. We are a stronger and better company than when I first started this project and I know this work will continue to help us reach new achievements and success in the future.

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