



A New Vision for Sales Readiness

Improving the efficiency and effectiveness of sales teams through contextual, continuous learning and knowledge sharing

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Introduction

Enabling sales teams, direct or indirect, to effectively understand, represent and sell a company's offerings, in a buyer driven world, is crucial to the success of any business. Many companies rely on a variety of approaches for sales readiness. But with today's accelerated pace of business and the avalanche of constantly changing information, the effectiveness of these approaches is questionable. In fact, the evidence indicates that typical readiness approaches expend a great deal of time and money with few long-term benefits:

To put it bluntly, the sales readiness process must change. *As Gartner points out, to be effective, organizations need a new vision that treats sales readiness as a process of continuous learning.*¹

A New Vision for Sales Readiness

Now, imagine a sales environment where:

- Subject matter experts within organizations have the ability to create new training modules rapidly, include assessments, and deploy it.
- Sales management has the ability to assign the training modules to their sales executives, based on their knowledge of their people.
- Sales executives and partners have the ability to take the training modules, at their convenience.
- Sales executives and partners have the ability to collaborate with each other, with management, and with marketing and share their perspective on the effectiveness of the training modules.
- Sales executives and partners also have the ability to interact with experts, privately or publicly, and get questions answered, issues clarified, and be able to get the perspectives and point of views that will be differing, but help improve their knowledge.
- Sales executives and partners have instant access to the exact knowledge nuggets, information and training that helps them perform their roles efficiently and effectively.
- Training can be created, deployed, and monitored with ease, and the proficiencies and knowledge gaps of individuals, regions, or entire sales teams can be readily tracked via highly visual dashboards.
- The collaboration, and interaction with experts, is stored and available to everybody. When a new sales executive is hired, or a new partner is recruited, in addition to the availability of the training modules, they would be able to take advantage of vast amount of knowledge, multiple perspectives and point of views, and individual experiences that have been captured organically.
- As time goes by, imagine the experiential knowledge that was organically captured, is instantaneous availability, and the impact it could have on new hires and new partners.

This is the new vision for sales readiness - improving the efficiency and effectiveness of sales and partner teams by combining effective formal training with contextual, continuous learning and knowledge-sharing.

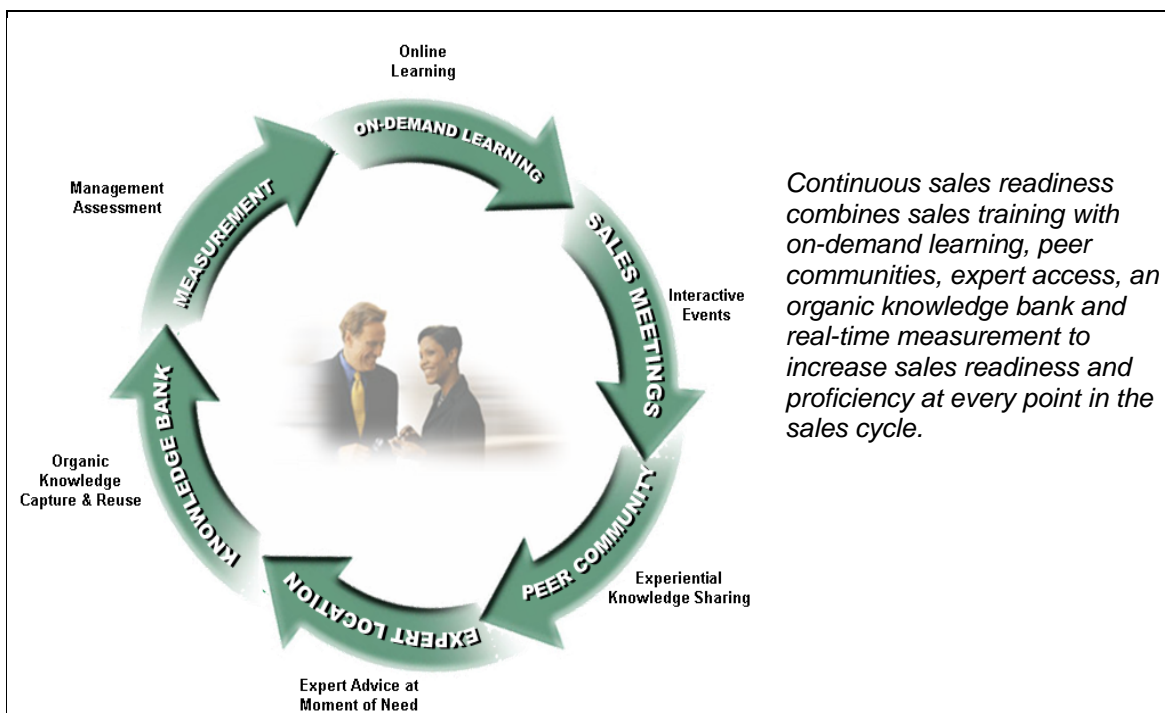


Requirements for the Vision of Collaborative Sales Readiness

By transforming sales readiness into a collaborative continuous process, organizations can constantly improve the performance of the sales professional, whether employee or partner. In addition, the continuous process helps those who support readiness efforts to develop and deliver high quality materials that effectively target learning needs. It also enables sales management to monitor the learning progress and knowledge levels of their team.

To provide the continuum required for this new vision of sales readiness, organizations need to deploy an integrated set of capabilities including:

- *On-demand learning.* Enable Subject matter experts, and training professionals to create, deliver and manage training, whether classroom or Web-based, that can be accessed when, where and how the learner needs.
- *Collaboration with peers.* Enable virtual communities to form and interact, offering an immediate, easy way to share and capture experiential knowledge.
- *Collaboration with Experts.* Facilitate easy identification of and interactions with subject matter experts across widely dispersed sales and marketing teams, or even across the whole company.
- *Organic knowledge capture.* Capture all collaborations and knowledge nuggets without special processes and tools, and without interrupting the normal workflow, to foster collaboration, reuse and promote self-service learning.
- *Management and reporting capabilities.* Provide highly visual reporting dashboards that allow sales management to quickly assess the proficiency of individuals, regions, or teams, and enable rapid, targeted remedial actions.





Each of these capabilities adds value, but if implemented individually, organizations cannot achieve the continuum needed to reach the new collaborative sales readiness vision. By integrating these capabilities, organizations can bridge the limitations of each and bring the world of training together with the ad-hoc world of collaboration with peers, and interactions with experts for a comprehensive solution with material impact on the organization's performance. In this paper, we will examine the individual values provided by each capability and look at how combining them yields the most effective enablement strategy.

Continuous Improvement with On-Demand Learning

On-demand learning provides highly interactive e-learning delivered as self-paced study modules. Sales professionals can practice and absorb knowledge in ways that suit their particular learning styles and study remotely so that learning fits into their schedules. Used as a part of sales readiness, sales professionals keep learning with personalized, easily consumed content that enhances and refines knowledge at the moment of need.

For example, when a new sales executive is hired, the on boarding process can start with a series of e-learning tutorials to teach product basics that eliminate the need for hours of presentations, in a class room setting. Additionally, management can use assessments to measure the impact of the learning modules, measure comprehension levels and ensure baseline competency. The quizzes can even be motivational tools when used for sales competitions with rewards going to the highest scoring participants.

Sales, marketing, and training staff can use Microsoft® PowerPoint to create the modules - just as they would have done for an event-based meeting - and make the modules available for on-demand learning. They can also combine and repurpose existing materials to optimize the use and value of current knowledge.

While on-demand, interactive learning offers an outstanding opportunity to deliver always-available sales enablement, it does have drawbacks. A lack of opportunity to interact with peers and subject matter experts can limit its effectiveness. The other disadvantage is that ad-hoc interactions, which are available in an event-based environment and help knowledge to be shared, are not available in an on-demand learning environment.

Enrich Effectiveness with Experiential Knowledge

The drawbacks with e-Learning discussed above, can be addressed by creation of a collaborative environment where new hires can interact with mentors, peers, management and experts. Virtual peer communities and the ability to quickly find the right experts with which to interact are an effective solution to the limitations of on-demand learning. Both are excellent ways to expose the tacit knowledge of the organization – that extremely valuable, but usually hidden information that reflects real-world experiences and best practices. Through virtual communities, sales professionals can take advantage of the knowledge of their fellow professionals continuously and systematically. Using different channels/methods of communications ranging from posting opinions, ideas, experiences in a community, to interacting with experts via email, or private messaging with management, peers, or experts, new hires can receive , personalized and rapid answers to questions, learn from successful account executives, share their own opinions and experience, and learn best practices that hone their



proficiency. As part of the collaborative readiness process, these tools are useful both during formal on boarding process and throughout a sales executives tenure as new products and new initiatives are introduced.

While collaboration through communities, interaction with experts, use of email or private messaging offer immediate, interactive information exchanges, the value of this knowledge is limited without a way to reuse it. Organizations need a way to capture ad-hoc knowledge and make it available to others who may need the same information, in another word, reuse it. The fleeting nature of these exchanges can be overcome when virtual communities and expert location are combined with a knowledge bank that organically captures knowledge as it is created. A successful collaborative enablement strategy integrates this organic knowledge capture with all of the methods discussed above for truly comprehensive enablement.

Enhance Sales Readiness with Organically Captured Knowledge

The ability to integrate formal learning, collaboration through virtual communities,

Accelerated Sales Readiness

A leading company that provides comprehensive drug benefit services to over 2,000 health plan sponsors has found OutStart solutions produce real benefits when used for continuous sales enablement.

The organization has experienced an 87% adoption rate among sales, marketing and SMEs. It uses OutStart to shorten sales cycles by accelerating the field's ability to answer customer questions as well as reduce legal exposure with corporate-approved responses.

them findable and usable by others. And it can readily work within an existing sales or company portal.

By fully integrating the knowledge bank with on-demand learning, peer communities, and expert location, sales and marketing organizations can reap the following benefits during the sales readiness process:

A Managed Environment for Information Sharing

Virtual communities and expert location do not simply provide standard e-mail interactions, but leverage familiar communication tools in a controlled environment that manages the exchange of information.

- ✓ Community management allows multiple individuals to participate in discussion forums and expert events on an as-needed basis.
- ✓ Access to experts is managed to identify the most appropriate expert, control volume and equally distribute workload.
- ✓ Management allows organizations to establish service levels for answering questions so that sales professionals can be sure they will get responses within acceptable time frames and of acceptable quality.
- ✓ Interactions are managed to fit the way people work as questions and answers are routed through familiar e-mail.
- ✓ Knowledge is captured organically as it is created, allowing for immediate reuse across the organization. Information can be captured easily using "Save As".

and interaction with expertise provides the opportunity to organically capture knowledge and make it available through quick, easy, self-service access. This is crucial to collaborative readiness. At the heart of this solution is a knowledge bank, which acts as a virtual repository for the nuggets of knowledge and training needed to enable sales readiness. The knowledge bank can store all interactions and make



- Knowledge shared during ad-hoc community and expert exchanges is captured as exchanges occur. As a result, experiential and SME knowledge becomes instantly available, allowing for immediate re-use. The knowledge bank grows organically, filling knowledge gaps without waiting for knowledge engineers or IT staff to add information.
- Integrated with e-learning solutions, the knowledge bank becomes the central site for accessing on-demand learning and eliminates the need to search through separate systems to find appropriate materials.

Measuring Learning Effectiveness

The final requirement for continuous sales readiness is the ability for sales management to track, monitor and measure the proficiency of their sales team. With an actionable, real-time reporting dashboard, managers can easily identify learning by each individual, review test scores to see in what areas each representative is knowledgeable, identify proficiency gaps, and take corrective action as needed. As a result, managers can know with certainty just how well teams and team members have absorbed knowledge, and can provide remedial training and knowledge to improve performance.

A Comprehensive Solution for Effective Enablement

By integrating on-demand learning, peer communities, expert location, an organic knowledge bank, and real-time measurement with traditional sales events, organizations can transform readiness into a process of continuous learning, knowledge sharing and knowledge capture. Here is an example of how all of these methodologies combine to increase knowledge understanding and retention throughout the sales cycle.

Sales Cycle	Continuous Enablement Strategy
<p>Before the sales meeting</p>	<ul style="list-style-type: none"> ▪ Product and sales managers use common tools such as Microsoft PowerPoint and Word to create concise self-paced learning modules that explain the major capabilities of a new product, sales strategies, and competition. ▪ As needed, training professionals can use more advanced desktop and collaborative training tools to create learning modules. ▪ The sales team is required to complete the modules before attending the kickoff meeting. They access the modules through the knowledge bank and optionally download them onto their laptops, allowing them to learn at their convenience. Integrated online quizzes identify weaknesses. ▪ Sales and marketing executives can manage and report on the entire process using quiz results, as well as analysis of community, expertise, and knowledge bank usage, to assess learning effectiveness and fine tune the upcoming meeting agenda and materials. ▪ The sales team uses the knowledge bank to review additional materials such as analyst and media tour presentations, white papers, and press articles about the new product. ▪ Various team members engage in community discussions to offer ideas and experiential advice about selling the new product. Expert forums provide more



Sales Cycle	Continuous Enablement Strategy
	<p>details about features and clarify e-learning materials. The knowledge bank automatically captures these exchanges so that the entire sales team has access to the information.</p>
At the meeting	<ul style="list-style-type: none"> ▪ Because the sales team arrives at the event already trained on product basics, the meeting skips the drone of endless product introduction presentations, and instead uses participative workshops, role-playing, and other scenario-based activities to build selling skills, teamwork, and understanding.
After the meeting	<ul style="list-style-type: none"> ▪ The knowledge bank captures ad-hoc conversations, digests, bulletins, learning modules, and other relevant sales information, and makes it immediately available so that all members of the sales and marketing organizations have timely access to accurate, relevant knowledge. ▪ Proficiency continues to increase with on-going access to the e-learning modules and, if desired, assessments. ▪ Sales professionals participate in discussion forums and subscribe to daily or weekly digests provided via e-mail. These automatically delivered digests are personalized for each person's areas of interest . ▪ Questions not answered immediately through the knowledge bank repository of previous questions, documents, and learning modules can be automatically routed to SMEs using expertise location to insure rapid, high-quality answers. ▪ Automatically distributed bulletins alert team members of important changes, such as a change in pricing. Sales managers are notified when team members have read the bulletins.

Conclusion: Transforming Enablement with OutStart

OutStart is unique in its ability to transform sales and partner readiness into a rich, sustainable environment that fosters continuous learning, knowledge sharing, and knowledge capture. The OutStart portfolio of products offers innovative solutions that leverage and blend the best of formal learning and knowledge-sharing. OutStart applications not only cost-effectively build and deliver interactive, personalized e-learning content, but also surround the formal learning experience with virtual communities, expert location, a tightly integrated knowledge bank, and an interactive management dashboard for assessment - all of which can be integrated into a sales or company portal for a single, unified source of continuous learning.

By combining these capabilities, organizations gain a comprehensive solution to the challenges of sales and partner enablement to:

- Reduce time-to-proficiency and training costs for new products and services with learning that is always available.
- Enhance competitive advantage with a highly professional, responsive sales team that answers customers' questions quickly, accurately and comprehensively.



- **Overcome organizational and geographic barriers to improve team selling, with access to experiential knowledge and best practices available anywhere, anytime.**
- **Increase the productivity of sales executives, partners, product marketing managers, SMEs, and trainers with knowledge self-service that can significantly reduce the number of repetitive phone calls and e-mails.**
- **Track individual and group proficiency and enable immediate remediation with extensive reporting available through real-time management dashboards.**

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¹ "Predicts 2006: E-Learning Will Become Intrinsic to Your Business Process," Gartner, 10 November, 2005