Social Behavior Provides Feedback for a Blended Evaluation

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by

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Abstract

Although interactive methods are widely used throughout the training industry, there is a right way and a wrong way to use them. If overused, a class could be perceived as too lofty and "happy". If interactive methods are underused a class will be too dull. The right balance is the key. The use of social learning theory, experiential learning, constructive feedback, effective evaluation and blended learning techniques offer the right balance of active learning (Silverman, 2006) and evaluation. When used effectively these ideas and tools give any trainer or designer the right blueprints to excel in the training industry.

Social Behavior Provides Feedback for a Blended Evaluation

There are many knowledgeable, experienced theorists in the training world. They have performed countless hours of research and have published many articles and books. However, no two trainers are the same. We all have our own, unique abilities, thoughts and philosophies. Mine is simple, and is composed of five areas: Social learning theory, providing effective practice through experiential learning, offering an opportunity for constructive feedback to the student, creating a plan for effective training evaluation, and combining some form of blended learning within training. This paper defines each aspect of my philosophy by explaining what each theory or idea is and then examples are given of my work where these theories or ideas are present. One's personal philosophy is built over many years and should not be limited to five theories or ideas, but should be molded and changed based on experiences and formal learning. Therefore, this is a snapshot in time and hopefully will become a live document of information as I learn from wonderful literature, great mentors, and real life.

Social Learning Theory

Social learning theory, as stated by Noe (1999) in *Employee Training & Development*, "emphasizes that people learn by observing other persons (models) whom they believe are credible and knowledgeable" (Noe, 1999, p. 82). He continues to state, "learning new skills or behavior comes from (1) directly experiencing the consequences of using behavior or skills or (2) the process of observing others and seeing the consequences of their behavior (Noe, 1999, p. 82)." Bandura discusses Social learning theory as three major components: vicarious learning (or behavioral learning), the ability to use symbols (verbal and imaginal), and the ability for one to self-regulate (as cited in Doo, 2005). Min Doo believes that "vicarious learning indicates that people can learn by observing others' behaviors without direct experience." (Doo, 2005, p. 2) Our ability to observe people's behavior is more unconscious than conscious. For example, when learning to walk, a child imitates an adult. As a child grows many of the things they learn are through observation. Adults learn to self regulate themselves. "Self-regulatory capabilities mean that an individual does not passively react to external stimuli" (Doo, 2005, p. 3). By utilizing this theory a training program focuses on the ability of the individual to learn from others and to apply their learning during and after training. This puts the learner in control, not the instructor. The instructor is a facilitator in the student's learning process. Teaching in this manner is expected to help learners understand what worked well in a situation as it shows one's behavior and consequences to their actions in a real life situation (Doo, 2005).

In my *Presentation Skills Workshop*, the entire class is based on this theory. Each presentation is given and the students learn from each other. A student gives a presentation; the students and the instructor give feedback and a discussion ensues regarding strengths and weaknesses. The student experiences how to give a presentation, observes others, and sees the consequences of other's behavior. I believe social learning theory bleeds into Bob Pike's instructor led, participant centered approach to learning whereby, "Training, as much as possible, should be a do-it-yourself project for the participants involved." (Pike, 1994, p. 1) Allowing the students to maximize participation, observe others, and practice the learned skill during a training session can increase retention, decrease boredom and provide results oriented training programs.

Experiential Learning

Experiential learning as stated by Carl Rogers in his article, *Experiential Learning*, "addresses the needs and wants of the learner." (Rogers, p. 1) Rogers talks about four qualities of experiential learning: "personal involvement, self initiated, evaluated by learner, and pervasive effects on learner." Experiential learning focuses on a training program being facilitated versus taught. Similar to Bob Pike's (1994) viewpoint on instructor led, participant centered training, the instructor is there to guide the students through the content and lean on their experiences and knowledge rather than dictating to them what information is to be learned. Practicing techniques in class gives the student a safe place to succeed or fail. "For practice to be effective, it needs to actively involve the trainee, include overlearning (repeated practice), take the appropriate amount of time, and include the appropriate unit of learning (amount of material)." (Noe, 1999, p. 91) Another aspect of experiential learning is, "watching others without directly participating can be an effective way to experience learning. The key is for the observation to be active rather than passive." (Silberman, 2006, p. 136) When a training program requires one person to practice a task and others to watch, it is important to make sure each student is involved in the activity. One way to do this is to assign roles for each individual, give them each tasks to evaluate and observe specific behaviors or steps. This allows the participants to actively participate even though they are not performing the task. (Silberman, 2006)

In my *Presentation Skills Workshop*, one person is asked to give a presentation while the rest of the students are asked to complete a feedback form. This feedback form guides each individual to watch for positive, as well as, negative tendencies of the student presenter. At the end of the presentation, the observers are asked to tell the student presenter what he did well and what he could improve upon. At the end the instructor agrees or disagrees with the observers, states examples, and gives her feedback to the student presenter. This offers all the students the opportunity to hear the feedback of the instructor so each person can incorporate the ideas into their presentation. Once this feedback session has taken place, the student presenter watches his DVD of the presentation, alone. This gives him the opportunity to immediately see and agree or disagree with the feedback given by all. In practicum, this immediate audio and visual feedback mechanism has been extremely well received by the students. They appreciate being able to see their presentation immediately, forcing them to see their strengths and areas of improvement.

Constructive Feedback

Providing effective feedback to a student is critical to their success. If an instructor only provides positive information, the student is unable to learn from their experience. Noe states, "To be effective, feedback should focus on specific behaviors and be provided as soon as possible after the trainees' behavior." (Noe, 1999, p. 93) Waiting to give feedback is difficult for both the instructor and the trainee. Too much is lost when time has past. Therefore, immediate feedback from the instructor and peers is critical during a training session, specifically a training session which requires practicing the learned skill. Larson, Day, Springer, Clark & Vogel believe, "Optimal supervisory feedback is characterized by being specific, constructive, and balanced in positive and negative expression, because these will allow trainees to accurately perceive themselves and their abilities." (Larson, Day, Springer, Clark & Vogel, 2003, p. 4) The way in which a trainee walks away from the training with a positive feeling about themselves and the subject matter, impacts their ability to use the information in the future. If a trainee feels deflated and badgered, they will be more concerned about their lack of performance rather than what they have learned.

The Presentation Evaluation Rubric created for my *Presentation Skills Workshop* offers areas of practical feedback and an area for strengths and weaknesses. This allows the instructor to give honest feedback in a constructive manner. "Withholding constructive feedback is like sending people out on a dangerous hike without a compass." ("The Importance of," 2007). Raymond Wlodkowski created "Strategy 48: Provide effective feedback." (Wlodkowski, 1999 p. 244) He states that, "Feedback appears to enhance the motivation of learners because learners are able to evaluate their progress, locate their performance within a framework of understanding, maintain their efforts toward realistic goals, self assess, correct their errors efficiently, self-adjust, and receive encouragement from their instructor and other learners." (Wlodkowski, 1999, p 244) Without an effective feedback mechanism built into a class, it is difficult for the student to understand where they stand with the instructor, how well they are capturing their ability to learn, and where their improvement areas lie. "Feedback is probably the most powerful process that teachers and other learners can regularly use to affect a learner's competence." (Wlodkowski, 1999, p. 245) For this reason I try to incorporate constructive feedback into my training programs. It is one of the greatest gifts I can give my students.

Training Evaluation

Effective evaluation of a training program is critical to an organization's bottom line and effectiveness. Without creating some form of evaluation within the program, training becomes an event versus an opportunity to learn or change behavior. Patricia and Jack Phillips (2005) created an evaluation model consisting of five levels:

Level 1 – Reaction, Satisfaction, and Planned Action
Level 2 – Learning
Level 3 – Application and Implementation
Level 4 – Business Impact
Level 5 – Return on Investment

These five levels of evaluation allow a company to understand the myriad of ways to make an impact on the organization. From simple evaluations the student fills out after class, to bottom line returns that fund a training program or make a training program a profit center for the organization.

In my *Proposal to Evaluate - Presentation Skills for the Sales Professional Workshop* these five levels of evaluation have been implemented. It is not always possible, nor viable, to implement all five levels of evaluation. In fact, Phillips and Phillips state that only 5% of training programs can or should be evaluated to their 5th level (Return on Investment), due to the exorbitant cost of doing so. However, 30 – 50% of programs should be evaluated to the 2nd (Learning) or 3rd (Application and Implementation) level. (Phillips, 2005) When considering which level to evaluate toward, the instructional designer must take into consideration the business goals. In the proposal there is a Data Collection Plan which spells out the measurements used and to what extent. There is also a ROI Analysis Plan which discusses how the goal will be met and by whom. These instruments are extremely helpful when trying to calculate ROI for an organization.

Blended Learning

Aligning a training department with strategic business goals is crucial to the success of any training department. As stated earlier, only 5% of training programs can or should be evaluated to the 5th level (Phillips, 2005). However, training departments must quantify their value through other means where possible. One way to do this is to help the organization achieve their overarching goals through creative solutions. One solution might be blended learning. Fernando Mortera-Gutierrez defines blended learning in this manner, "The term blended learning is used to describe a solution that combines several different educational delivery methods, such as collaboration software, web-based courses, and computer communication mediums with traditional face-to-face instruction." (Mortera-Gutierrez, 2006, p. 3) Blended learning can bring true bottom line savings to an organization. Michael Fox believes strongly that blended learning "holds the promise of real return on investment, faster time to market, and increased revenues." (Fox, 2002, p. 1) He defines blended learning as providing "a tailored solution that matches the learning outcome to a defined business problem." (Fox, 2002, p. 3) Aligning the entire training organization to meet the overall business needs is a must in this economy.

To simplify the application of blended learning, there are some main components that are important for this technique to be successful. A good Learning Management System (LMS), classroom training, synchronous (live e-learning) or asynchronous learning (self-paced e-learning) and the flexibility to make the program work, all of these things can start one on the path to creating a blended learning program. "At its most basic function, an LMS can enable centralized registrations, course and learning path management, tracking and reporting, and assessments for classroom training and e-learning solutions." (Fox, 2002, p. 4) Having an effective LMS can make or break a program roll out. Taking information back to top management in a concise, effective manner is the LMS's major roll.

Classroom training, while sometimes perceived to be expensive, is often times required for effective retention. Many companies require some form of hands-on training that cannot take place in the field. When used in conjunction with synchronous or asynchronous learning, classroom training can be perpetuated over many months, increasing repetition thus increasing retention.

Remaining flexible when creating a blended learning program is also important. Timothy Kroecker believes, "Because the depth of knowledge being imparted can vary from introductory to advanced, the blended-learning approach can be used several times with different content in a development program." (Kroecker, 2007, p. 1) Utilizing information more than once can save companies money through blended learning. In the past, classroom training took up too much time with repetitive information. Now more advanced users can review earlier learned material on their own rather than sitting in a lengthy class. While there are many aspects of blended learning that can make it better and even more complex (for example simulations, e-tests, mentorship programs, et al), establishing an effective LMS and combining classroom training with synchronous or asynchronous learning are some main areas to focus on first.

In my *Strategic Performance Plan*, a blended learning approach is outlined for senior management. The benefits of a blended learning approach are: increased sales, increased productivity, and consistent standards of performance. A major focus for the company as a whole is to decrease customer churn and to increase employee retention. The blended learning approach is designed to accomplish both of these goals. By creating a customer training program that is state of the art and can be utilized anywhere in the world, many of the customer complaints can be minimized. In addition, employees would now be able to access their training from the comfort of their home. They wouldn't be pulled away from their families, yet again, to attend a week long training session at corporate. This would be minimized through some regional classroom attendance (versus having to fly to another location), on-line learning asynchronously, and the development of a mentor/coaching program.

Striking the right balance of interactivity, cognitive learning and evaluation is the key to becoming a great trainer. I believe social learning theory and experiential learning have helped me grow into the trainer I am today and into the future. Creating an opportunity to provide effective training to a participant (Strategy 48 of Wlodkowski) has also helped me create job aids to assist myself, and others, to provide effective feedback to the students or peers early and often. Learning how to create a proposal for effective evaluation is critical to the success of any training program. The knowledge gained from Philips and Philips that not all programs need to be evaluated to the 5th level has been critical to my understanding of evaluation application. Customizing a blended learning approach can assist with meeting strategic business goals. This in itself can give the training department leverage the next time downsizing takes place. Creating value for the organization makes a training department indispensable and more importantly respected in their organization.

Exhibits Overview

- ***Strategic Performance Plan*** – This plan outlines how a major corporation could implement a Learning Management System and a blended learning program to realize increased productivity and decreased turnover. It gives a detailed overview of the company, where they have come from and where they are going with training, and finally their philosophy about training. There is a gap analysis which shows the lack of upper management support and resources due to a lack of understanding of blended learning. A SWOT analysis uncovers major weaknesses and threats to the organization. An extended learning and performance architecture table identifies products and deliverables designed to close the gaps and minimize the weaknesses and threats. A change management plan has been created to assist with managing the corporation with the new blended learning philosophy. Ultimately, this is a plan that a professional trainer could use to walk into this organization and get buy-in and action toward a blended learning program company wide.
- ***A Proposal to Evaluate: Presentation Skills for the Sales Professional Workshop*** – This is a proposal created for upper management to help them understand the ROI of this workshop. It outlines how the company could increase closing rates and increase sales volume to realize a $74,000,000.00. It is based on Phillips' 5 levels of evaluation. This plan gives a brief overview of the workshop it is designed to evaluate, as well as, provides: the delivery mode, the duration of the class, a description of the audience, course goals, and objectives. In addition, it gives a detailed description of the way in which each level of Phillips' evaluation model is achieved. A work example is provided for levels 1-3. A data collection plan is outlined with descriptors for measurements and outcomes. A ROI analysis plan is presented to include methods of converting data to monetary values, as well as, cost

values, tangible, and intangible benefits. An estimate of program costs and benefits has been created to understand what the bottom line impact will be when funding is provided.

- ***Presentation Skills for the Sales Professional Workshop*** – This workshop is created for sales people, but can be modified for non-sales personnel. It has been designed to be highly interactive. This workshop plan is designed for a trainer/facilitator to be able to execute, with reasonable prep time, a Presentation Skills Workshop with accuracy and integrity. This plan includes a learner analysis which describes the entry behaviors, attitudes, motivation levels, ability level, and general group characteristics of the learner. This plan also includes a descriptive terminal and behavioral objective that sets the stage for the trainer and the learner. There are extensive instructor directions regarding the successful execution of this program. This step-by-step guide gives the instructor tips and tricks to make the training be presented flawlessly. It includes assessment exercises and follow-through activities. Finally, it gives the instructor cues to check for learning transfer. A student workbook, instructor guide, and PowerPoint slides are also included in the plan.

Exhibit #1 - Strategic Performance Plan

Part 1 – Analysis of Current Situation

Overview of the Company

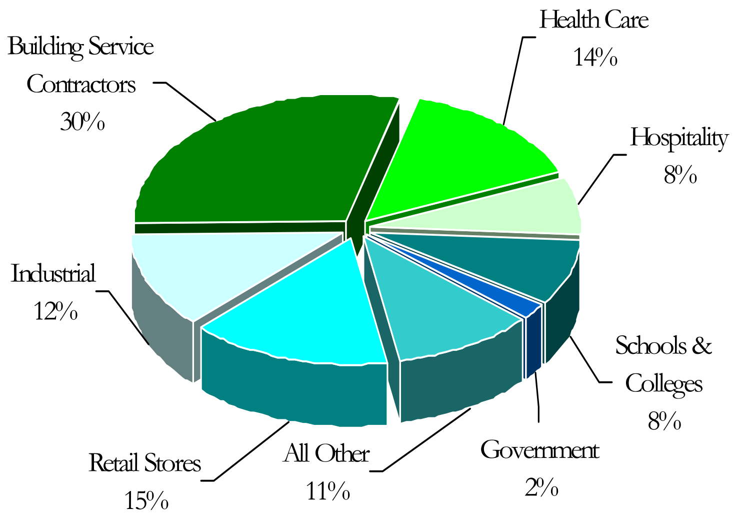
The Butcher Company (Butcher's) was founded in 1820 by Charles Butcher in Malden, Massachusetts. Butcher's is a major manufacturer in the Cleaning and Maintenance Industry. Butcher's manufactures cleaning chemicals for use in hospitals, nursing homes, airports, office buildings, schools, et al. Back in the early 1960's Butcher's decided to sell solely through privately held Janitorial Distributors. This meant that none of their products would be sold through hardware stores or in a retail environment. This commitment to sell solely through distribution created great trust and loyalty from their Distributors. To this day, Butcher's does not sell a dime to any retail environment. Butcher's sells their high quality cleaning chemicals around the world. Their largest markets are the United States, Canada, Europe and Japan.

Support for the Janitorial Distributors is provided by local District Managers (DMs) who support 8 – 10 Distributors in a large geographical area. The DMs are the first line of contact for the Distributors. They are responsible for increasing sales, training the Distributor Sales Representatives (DSRs), opening large major users for the Distributors, and managing the day-to-day affairs between Butcher's and the Distributors. The position of the District Manager and the Distributor Sales Representatives are the keys to Butcher's profitability.

As you can see by the diagram below, the Cleaning and Maintenance Industry is divided into seven major categories: Building Service Contractors (BSCs), Healthcare, Hospitality, Schools & Colleges, Government, Retail, and Industrial. Butcher's decided in 1996 to focus on three major markets: BSCs, Healthcare and Schools & Colleges. They did this to provide focus toward these three segments internally and externally. By focusing on these three major markets, they were able to hone in on 52% of the market who purchase cleaning chemicals. This provides great direction for Butcher's sales team.

According to Kline and Company, (the only research firm to provide background within the Cleaning and Maintenance Industry) these three segments are growing faster than the industry as a whole, they value the products Butcher's makes, they buy primarily through Janitorial Distributors, and finally, Butcher's training programs can help them reduce costly turnover and re-do's (a redo is when a task has to be repeated due to lack of proper attention to detail).

The Cleaning Maintenance Industry Category Breakdown



At the Butcher Company, the Training Department consists of a Director of Training, a Training Manager for Regulatory Affairs (mainly for the manufacturing facility) and three Zone Training Managers throughout the United States. The Director of Training and the Zone Trainers report into the Vice President of Marketing and the Training Manager for Regulatory Affairs reports into the Vice President of Operations. Major training initiatives are focused on the Sales and Marketing teams. All other training is the responsibility of the appropriate department managers, although they usually consult the Director of Training for assistance and advice.

Changes in the Organization

In 2000 Butcher's was purchased by its major competitor, JohnsonDiversey (a sister company to SC Johnson Wax). At first the changes to the organization were minimal. JohnsonDiversey provided increased funding for some projects that were pending and the love fest began. In 2003 that all changed. The company was relocated from Marlborough, MA to Racine, WI. All departments were transferred and only a few people were offered the opportunity to move. Manufacturing was shut down, marketing, training, and accounting were folded in, and sales began reporting to JohnsonDiversey managers. The upper management team was terminated and the Board of Directors was no longer needed.

The good news was the former President of The Butcher Company was named the Vice President of Sales at JohnsonDiversey. Since he was so intimate with the Butcher business, Butcher's did not disintegrate. Rather, it has thrived and grown over the last three years. The sales department is still in tact and supports the day-to-day operations between Butcher's and the Distributors. For the most part, the Distributors have seen an increase in service level, due to the backing of a $2.5 billion company versus a $70 million company. Butcher's has become one of JohnsonDiversey's most profitable lines.

View of Learning & Development

In the early 1990's Butcher's made a commitment to be the best Trainers in the Cleaning & Maintenance Industry. This commitment came from the top and was supported financially and motivationally. Butcher's began by working with customers to create training programs in their three designated major markets: BSCs, Healthcare and Schools & Colleges. Next they created a comprehensive training program for their internal sales people. Finally they partnered with major industry Associations to market their programs: BSCAI (Building Service Contractors Association International), IEHA (International Executive Housekeepers Association) and APPA (The Association of Higher Education Facilities). These organizations provided networking and training opportunities for Butcher's to expand their business and learn from the experts.

Since then, JohnsonDiversey has supported the training initiative at Butcher's from a marketing perspective. This means they loved the training, but they weren't willing to keep the training updated or expand where Butcher's left off. Butcher's reputation in the training arena has suffered due to the lack of commitment toward the external training programs. The internal training has continued on as before. The former Director of Training was hired on as a consultant to perform the same training as before (updated of course). This has afforded the District Manager's the ability to say they are given the same training the Distributors have grown accustomed to; this has maintained their credibility.

Current State of E-learning

The current state of e-learning is non-existent at Butcher's. The Industry as a whole has not embraced e-learning. One of the reasons for lack of engagement is the fact that few janitorial closets have computers and the funding for computers for the janitorial department is limited. Healthcare has the best reputation in the industry for use of computers, but it is still limited. For this reason Butcher's created a CBT program for Blood Borne Pathogen Training (an industry regulated training that needs to be performed annually) for the Healthcare Industry. Another reason for being behind the times is the fact that the average cleaning attendant has an eighth grade level of education. This places a lot of restrictions on the creation of computer based training programs, since most cleaning personnel do not know how to use a computer and don't have access to one on the job.

Internally e-learning has not been embraced due to the lack of funding and fear of keeping their training materials updated. Little do they know that it would actually make updating their training easier and more efficient.

Current State of Technology Infrastructure

The Butcher Company provided laptop computers for their sales force in 1995. Training was conducted on how to use the laptop, where their forms were located, and basic usage of the Microsoft Products. After the initial training was conducted, new hires were taken through an abbreviated version of the training. Since Butcher's was acquired by JohnsonDiversey, the laptops have been upgraded and the sales department has been trained on sales management software. All employees have access to the Internet and an internal Intranet. The Intranet provides communication for employees, forms needed for daily use, and connection with international offices.

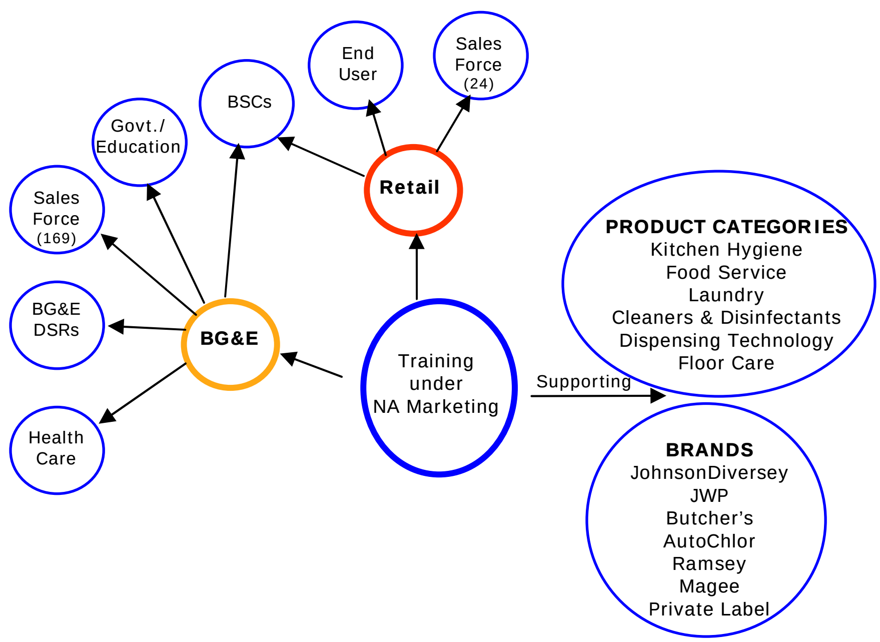
The IT group is highly secluded from the rest of the organization. It is difficult to get a response from someone, unless the computer has been stolen or doesn't work at all. They are very busy and understaffed. At this time there is no funding for e-learning organization wide. The entire organization has been put under a financial microscope to squeeze whatever money they can out of each department. Support staff has been downsized and many jobs have been folded into other positions. Since there is no funding for e-learning, there is no evaluation process, talent, coordination of efforts or accessibility to e-learning.

The Mission of Training at JohnsonDiversey North America (JDNA)

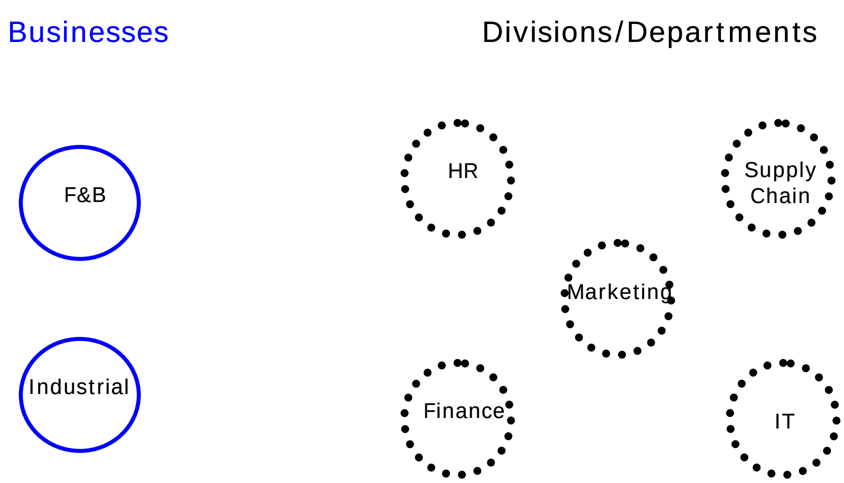
The Mission of Training at JohnsonDiversey North America is, "to be the preeminent provider of measurable performance improvement results through high quality training solutions for internal and external customers, to help them achieve their strategic business objectives."
The internal customers are the BG&E (Building Service Contractors – through distribution, Government & Education) and Retail Sectors. The external customers are Distributor Sales Representatives, Building Service Contractors (direct business), and Product End Users. The current training solutions provided are job based training aids, classroom based training (on-site), and classroom based training at JohnsonDiversey's World Headquarters in Racine, WI. This limits what the customers in Japan, Europe and across North America can do when their budgets are constrained. On-line training would impact this greatly!

As you can see by the diagrams below, the training department has a huge responsibility to the organization. There are seven Businesses, six product categories, and seven brands the training department supports. All of this support is done with minimal staff and minimal funding. Most of the businesses are spread across the world and have extremely limited access to the training department.

North American (NA) Businesses and Sectors supported by Training



NA Businesses, Divisions/Departments without Support from NA Training



Part II – Description of Desired Situation & Vision

After investigating what has happened to the vision statement of The Butcher Company, I have come to find out it no longer exists. The vision of Butcher's is now that of JohnsonDiversey. Later in this paper is a detail of "The JohnsonDiversey Advantage" (the mission of the company) and "This We Believe" (the guiding principles of the company). Both of these documents will help guide us through the creation of the performance vision.

When it comes to accomplishing the needs of all the different businesses and divisions/departments, prioritizing is paramount. The role of the training organization is:

- Alignment with the JohnsonDiversey strategic goals (currently being reworked due to a change in leadership)
- Key income producers (e.g. Sales Training, Customer Service, Product Launches)
- Customer requirements
- Legal requirements
- Positive cost-benefit analysis
- Time and effort required to complete
- Availability of existing content that can be repurposed
- Staff available
- Budget
- Expertise of trainers, instructional designers and subject-matter experts
- Contributions toward global initiatives

To this point, the training department has achieved these goals by creating training on the fly. The department is very reactive rather than proactive; it is working in survival mode. Because there are only three people in the department to support all the groups shown above, it is very difficult to achieve these goals. The department has been given authorization to hire four new field trainers in the fall (2006). The job descriptions are in the works as we speak, but there seems to be a lot of ambiguity around whom and what the position will truly accomplish. The initial thought is that these trainers will be hired to assist in sales training, product launches, legal training requirements, and contributions toward global initiatives. The training department needs to become more proactive. The Director needs to take the initiative to leading the charge when it comes to training. Right now he is very tentative (due to all the upper management changes). He consistently waits for others to direct him, rather than presenting ideas, being creative and moving forward. This would assist the company in understanding the mission and vision of the training department. It would also afford them more "air time" toward getting funding toward their training initiatives.

Competitors within the industry are slow to react to training innovations. Because the industry focuses its energy on cleaning personnel who do not have access to computers, the training is old school. Two competitors in the industry, Ecolab and 3M, have begun using on-line creation of training as a resource for learning. It is difficult to know what types of training these companies are providing their own employees.

E-Learning Value Proposition

The investment in the training department by the corporation will provide the following for the future:

Outputs

- Increased sales
- More tasks completed
- Increased productivity
- Consistent standards of performance

Costs

- Increased cost savings
- Increase employee retention
- Decreased customer churn
- Sales cycle cost reduction

Time

- Faster completion time
- Faster prospect-to-close ratio
- Less supervisory time
- Quicker ramp-up time for new employees
- Increased operational efficiencies

Quality

- Less re-work
- Less waste
- Increased customer satisfaction
- Increased employee satisfaction
- Increased regulatory compliance

The tasks that are needed to achieve these goals are:

- Design, create and implement a learning management program to capture the vast knowledge within each department.
- Within the learning management program, create just-in-time on-line training modules for new product introductions, sales training, negotiations training, presentation development training, new employee training, etc. Courses to be determined based on the needs of the corporation. The creation of on-line learning will allow the organization to work with the over 200 sales people across North America.
- Creation of blended learning programs to support the on-line initiative. On-line training isn't enough in this industry. Having classroom training to support the on-line training is crucial. Creation of a mentoring and a coaching program would be ideal to support both the on-line training and the classroom training.

The principle that is most important in guiding how the training organization will implement the mission and realize the vision for learning lies within "This We Believe." It is important we support the departments with integrity and with results in mind. It is crucial we abide by the vision of the founding fathers and maintain a high class training organization (see below).

The JohnsonDiversey Advantage

"Beyond clean, we are dedicated to being the best at simplifying the lives of our customers. We believe we will be the best at simplifying the lives of our customers by:

- Investing the time to listen, understand and respond to their unique cleaning and hygiene needs;
- Taking a personal interest to ensure that our customers' facilities are consistently clean, safe and attractive;
- Pursuing innovation in every form likely to simplify our customers' lives and increase their profits; and by
- Partnering with our customers to exceed their customers' expectations everyday, everywhere."

This We Believe

"The values expressed in *This We Believe* have defined our company for decades. They serve as a promise to people to whom we are responsible and whose trust we continually seek to earn.

Employees
We believe that the fundamental vitality of our worldwide company lies in our people. We commit ourselves to supporting, encouraging, developing and strengthening our team of employees around the world.

Customers and Users
We believe in earning the enduring goodwill of customers and users of our products and we commit ourselves to developing valuable, environmentally sound products and services around the world.

General Public
We believe in being a responsible leader within the global economy. We commit ourselves to conducting our business in a fair and ethical manner, keeping the general public informed of our actions and sharing the results of our hard work.

Neighbors and Hosts
We believe in contributing to the social and economic well-being of the countries and communities where we conduct business. We commit ourselves to being a good corporate citizen, actively seeking the counsel of local and corporate management in our host communities.

World Community
We believe in improving international understanding. We commit ourselves to act with responsible practices in international trade and investment and promote the exchange of ideas and techniques.

A Promise to Our Planet and To Our Communities
Part of being a family-owned company means taking a long-term view of our business and the world. We can't look at what we're doing today without seeing the impact it will have on the future.

Long before it was fashionable, we understood the natural, critical connection between good environmental practice and good business. Today, we have documented that connection in Responsible Solutions.

It's no coincidence that an organization committed to helping places stay clean and safe should keep that same focus on the place that ultimately matters most to us all: our planet.

Our Promise to People Also Goes Beyond Clean
Every year, JohnsonDiversey commits a portion of pretax profits to the S.C. Johnson Fund. The fund operates programs designed to improve the quality of life in our host communities around the world and dispenses millions of dollars in grants and matching funds. This commitment to individual and corporate responsibility is one of the key principles articulated in "This We Believe", the document that reflects the deep-seated beliefs we have held since our founding in 1886. Our commitment to our planet and to our communities is as deep as our century-old roots."

As you can see by these two very important documents, the organization is committed to its people, its customers and the environment. The Responsible Solutions reference is to a company wide commitment to being environmentally friendly with the products that are manufactured and with the buildings it builds. This is very important to JohnsonDiversey.

Part III - GAP & SWOT Analysis

GAP Analysis

Issue	Current Situation	Desired State	Gap	Probable Root Cause
Senior Management's knowledge/understanding of e-learning value (or lack thereof).	A lot of lip service toward training. Use of consulting firm to recognize issues within the organization. Recently added four new field trainers based on consultant recommendations, but their job responsibilities are uncertain. No conversation with Training Director as to what their job responsibilities will be prior to creating new positions.	Creation of knowledge management program, with e-learning capability, to support sales. Increase communication between departments. After successful implementation of e-learning in the sales department, use the model to expand into other departments.	Lack of senior management support has resulted in resources being given without consulting those that it will impact.	Lack of understanding the value of knowledge management or e-learning. Use of outside consulting firms who recommend resources without truly understanding the business.
Lack of ability to tap into resources.	Due to layoffs/ headcount reductions employees with high levels of experience are being asked to leave. There is no protocol in place to capture their knowledge before leaving.	Creation of knowledge management program to capture information and create a resource for internal employees.	Currently knowledge management doesn't seem to be a high priority for the organization.	There isn't a current headcount in place to neither capture all of the information nor put a program in place.

SWOT Analysis

Strengths	Weaknesses
• Financially stable company that is a privately held family business.	• Reduction in budgets across the board (including headcount).
• Infrastructure is technically sound and prepared to handle e-learning capability (CRM, Intranet enabled, sales people have laptops with high speed access, IT department highly capable).	• Lack of upper management understanding of e-learning /funding.
• Long tradition of formal training program with excellent reputation in the industry.	• Lack of communication between departments (2.5 billion dollar company where each department is ran independently).
• Vast experience within the organization to provide broad based training options.	
Opportunities	**Threats**
• By showing the value of e-learning as more efficient and cost effective, upper management may be more supportive (additional funding might become available).	• Continued budget cuts and headcount reduction.
• Cross training opportunities could increase productivity, reduce costs and increase communication between departments.	• Lack of e-learning may effect the time it takes to educate employees on new products introduced or competitive intelligence.
• Since the infrastructure is in place, it would be a turn key program to establish a knowledge management/e-learning environment for the entire organization.	• Competitors using e-learning to increase efficiency.
• Creation of an e-learning training program would make internal class room training more efficient, save time, reduce costs and increase sales potential.	

Part IV – Extended Learning & Performance Architecture

The following table identifies products and deliverables designed to close the gaps:

Architectural Component	Products/Initiatives	Target Audiences*		
Training	*E = Employees, M = Management, & EU = End Users*	E	M	EU
Classroom Training	Update and maintain current classroom based training. Make sure the classes are on target for all audiences (internal & external).	X	X	X
	Add any additional classes as needed.	X		X
Online Training	Currently non-existent. Research and create programs for each department, starting with sales department and creating programs for all departments	X	X	
	Create an on-line, cost-based university for new distributors and distributor representatives to complete prior to arriving at classroom training.			X
Knowledge Management				
Information Repositories	Employee handbook with policies and procedures.	X	X	
	Electronic versions of job descriptions.	X	X	
	Electronic posting of vacant jobs.	X	X	
	Electronic sign up sheets for internal and external training programs. This will allow students to sign up online.	X	X	X
	Electronic resource guides by market segment (floor care, carpet care, washroom care, & degreasers) with a list of SMEs on each subject.	X	X	
	Online best practices for creating a good business plan.		X	
Communities and Networks	Links to pertinent industry specific websites (ISSA, BSCAI, IEHA).			
	Links to government agency websites (OSHA & CDC).			
	Area for employees to share ideas within Lotus Notes.			
Performance Support				
	Electronic templates for employee forms (expense reports, weekly feedback reports, annual review reports, etc.)	X	X	
	Electronic/downloadable price lists for sales people's computers and PDAs, updated prior to price increases.	X	X	X
	Electronic/downloadable "cheat sheets" for dilution ratios and conversion sheet for liters to gallons and vice versa.	X	X	X
Mentoring and Coaching				
	Assign mentors to new hires for a period of 6 months.	X	X	
	Assign mentors to new managers for a period of 1 year.		X	

Part V - Change Management Plan

Getting people to change can be extremely challenging. Having a plan can make the change more manageable and more successful. "Research tells us that it should only take approximately 5% of each stakeholder group to embrace your e-learning initiative for it to eventually become imbedded in the organization. And, once you get 20% of each stakeholder group (the early adopters) to support your e-learning efforts, the momentum increases and your implementation becomes nearly unstoppable." (Dublin, 2004) The following table lists, for each of thirteen success factors from Rosenberg's book, *Beyond E-Learning*, methods of how the factors will be included.

Success Factor	Method(s)	Stakeholders Targeted	Responsibility	Time-frame*
1. Get Leadership Onboard Early	• Present to the North American Leadership Team (NALT) at their quarterly meeting. • Establish a task force to give feedback to the program along the way. • Send a company wide newsletter to kick off the program and inform employees of what is happening. Keep the Newsletter coming Pre-Implementation, during Implementation and Post Implementation to keep the lines of Communication Open.	• NALT • Vice Presidents of each Business • IT group	• Project Manager (PM) • Implementation Team	P, I, O
2. Tout Success Stories	• Post the Newsletter on the Intranet. This will include all success stories, as well as, changes or updates.	• All Employees	• PM and IT person designated to help get things established.	P, I, O
3. Focus on Early- and Second-Wave Adopters	• Create a steering committee to assist with early testing. Solicit their input throughout for modifications and upgrades. • Identify managers to serve as role models. Have them write articles for the Newsletter.	• Steering Committee • Select Managers	• PM	P, I, O
4. Avoid Consequences, and Build Incentives	• Create a MS Project Database to assist with the launch. Use this to help keep people informed as to their roles and responsibilities. Achieve milestones on target dates and share success stories.	• Key stakeholders and NALT team.	• PM and Assistant	P, I, O
5. Build a Solid VP Based on a Clear Vision and Attainable Benefits	• Share the Strategic Performance Plan with all employees via the Newsletter on the Intranet. • Follow-up with a company wide e-mail that asks for one-on-one feedback.	• All Employees	• PM	P

6. Involve Stakeholders and Constituents Throughout the Process	• Create a prototype of the KM program and sample e-learning opportunities to be shared with sales managers and elite sales people at the National Sales Meeting. This will get them to buy into the program early on.	• Sales Managers • Elite Sales People • Project Manager	• Implementation Team	P, I, O
7. Avoid a "This Won't Work" Message	• Post success stories in the Newsletter. Constantly talk up the program around the office – create a positive "buzz".	• All employees	• PM	I, O
8. Set Priorities	• Use MS Project to set priorities based on steering committee feedback. • Present findings to the steering committee. • Present outcome to NALT and get sign off to move forward.	• Project Manager • Steering Committee • NALT	• PM	P, I
9. Dispel Fears of Technology	• Set up three or four computers in the lobby area for employees to stop and try the new program. This has been successful in the past. • Provide training groups for sales staff (to start). After successes, begin implementation into different departments.	• All employees	• PM & Implementation Team	I, O
10. Give People Time to Adapt	• Keep the Newsletter active, with many success stories. • Roll out the program department by department and post on Intranet when each department is targeted for roll out. (Communicate, communicate, communicate!)	• All employees	• Implementation Team	I, O
11. Don't Forget Training	• After initial introduction, provide on-line training modules for people to use as refreshers or for those who can't attend original training.	• Departments being targeted for launch	• Implementation Team	I, O
12. Provide Ongoing Support	• At the end of each on-line training module, provide electronic/printable job aids for use after the training. • Provide on-going training classes as needed. • Set up a hot-line for those to contact a live person for Questions & Answers. • Create FAQ webpage. Questions derived from hot-line.	• All employees	• Implementation Team	O
13. Don't Confuse "I Can't" with "I Won't"	• Add quotes to the Newsletter from people who find the Program useful and how. They will become recognized users and could make themselves available for questions.	• All employees	• Implementation Team • Recognized (successful) Users	I, O

*Timeframe: P=Pre-Implementation; I=Implementation; O=Ongoing (post-implementation)

Exhibit #2 - A Proposal to Evaluate - Presentation Skills for the Sales Professional Workshop

Implement this training and make your company over

$74,000,000.00!

Part I: Course Description and Evaluation Goals

Course Title

Presentation Skills for the Sales Professional Workshop

Course Description

During a sales presentation to a customer, the Learner will present with confidence the features and benefits of their company, products and themselves. The Learner will present this information using 1) good voice inflection 2) effective questioning techniques and 3) appropriate body language. The presentation must be presented in an environment conducive to learning. Reviewing the information, at the end, will solidify the sale.

Prerequisites:

- Introduction to PowerPoint
- Creation of two short PowerPoint Presentations: One about the student's professional background and the other about their personal history.

Delivery Mode

The facilitator of the class will use lecture, group break out sessions and student presentations to help increase retention of the subject. Each student will present two different presentations during the course of the class. The first presentation is the "Pre Test" and the second presentation is the "Post Test." The facilitator will evaluate the student's ability to apply the new skills learned in each presentation. Each presentation will be digitally taped and the student will be given a DVD of their presentations at the end of the course. This will give them the ability to see for themselves the impact of their knowledge and skills. They will also be able to isolate the areas they need to be improved upon. In addition to the DVD, students will be given a workbook which they will use throughout the class. This workbook includes information about the knowledge and skills they will learn, as well as, break out sessions and fill-ins to keep the learner engaged.

Duration / Schedule of Classes

This one day course will be offered as needed per the client's requirements. There will need to be a commitment from sales management to use the *Presentation Evaluation Sheet* to gage the change in behavior of the student long term.

Audience

This course is designed for experienced sales people for any organization. It can be tailored to include specific examples from the customer's industry. The course can also easily be configured for non-sales personnel depending on the need of the customer. If the course is customized for non-sales personnel, the evaluation results will be dramatically different.

Course Goals

The purpose of this class is multifold:

- ✓ To increase the corporate image through effective, concise presentations to potential customers.
- ✓ To increase the confidence of the sales staff to use Power Point during their sales calls.
- ✓ To decrease the time it takes to get to "YES!" and ultimately increase sales.
- ✓ To impress the customer to the point where they want to tell their friends and increase the referral rate!

Learning Objectives

- ✓ Recall proper use of voice inflection to engage participants.
- ✓ Practice using different questioning techniques to elicit participation.
- ✓ Employ the proper use of body language to effectively convey the point.
- ✓ Create a good learning environment for the client.
- ✓ Close the deal!

Part II: Evaluation Design and Strategy

Design Strategy

The sales management team is requiring every member of the sales group to participate in the presentation skills class. To minimize bias to the training, a control group of randomly selected sales people will be selected as a self study class. They will be asked to give a presentation, then study the materials provided. Once the self study is completed, the students will then be asked to give a presentation again. During both presentations, the *Presentation Evaluation Sheet* will be used to assess their skills. The control group's sales progress will also be tracked in the same manner as the other course participants. This should reduce the chance of outside interpretations of the course. Below is a description of the different levels of evaluation and how they will be monitored.

Level 1	Questionnaire/Reaction Sheet (see Sample A - Data Collection Instruments).
Level 2	Pre and Post Presentations to gage learning. Presentation Evaluation Sheet will be used in class to assist in evaluation (see Sample B).
Level 3	Presentation Evaluation Sheet will assist in assessing the student's ability to change behavior from the beginning of class to the end of class. It will also be used by the managers to assist them in evaluating the presentation skills of the learner after 1 month, 3 months and 6 months.
Level 4	Perform interviews with sales management one month after training occurs to get their point of view of the results of training.
Level 5	Analysis of sales data. Measure the return on investment based on the ROI analysis plan. Have sales increased based on improved presentation skills? Compare sales of the control group versus the students who attended the course.

Who will provide the data?

Data for Level One, reaction, will be collected by the facilitator. The data for Level 2 and 3, learning and behavior, will also be collected by the facilitator in a pre and post presentation evaluation. Level 4 results will be the responsibility of the sales manager in the field. Level 5 ROI will be provided by the HR manager along with the help of the VP of Sales who will provide the sales figures.

What information will be collected and from whom?

The information that will be collected is as follows:

- Number of presentations given by each sales person weekly.
- Number of presentations that resulted in a closed sale versus loss of sale.
- Weekly and monthly sales by sales person (up to six months after training).
- Number of sales calls performed each day. Percentage of cold calls versus referrals.
- List of clients before training and 1, 3 and 6 months after training.

Who will manage the evaluation project?

The evaluation project will be managed by the sales manager assisted by the course designer and the administrative assistant.

Where will the data be collected?

Level 1 data – information will be collected at the end of class.

Level 2 data – information will be collected during class, after the presentations.

Level 3 data – information will be collected during class, after the presentations.

Level 4 data – the sales manager will collect the data on the job.

Level 5 data – will be collected at headquarters through sales reports.

When will the data be collected?

The data will be collected at one, three and six months after the date of the training. This will provide the student ample time to implement the new techniques they have learned.

Follow-up evaluation

The follow-up evaluation will be the responsibility of the sales manager. Each student's manager will be given the Presentation Evaluation rubric as a tool to evaluate their people. Each manager will be asked to attend a presentation and evaluate the student within 30 days of attending the class. This will reinforce the use of the new skills learned.

Part III: Evaluation Instruments

Data Collection Plan

Program: Presentation Skills for Salespeople **Responsibility:** Laura Swidorski - Trainer **Date:** ____________

Level	Broad Program Objective(s)	Measures	Data Collection Method/Instruments	Data Sources	Timing	Responsibilities
1	**REACTION/SATISFACTION And PLANNED ACTIONS** • Positive reaction – 4 out of 5	• Positive feedback	• Questionnaire/Reaction Sheets	• Participant	• End of program	• Facilitator
2	**LEARNING** • Learn new skills to improve presentation skills	• Rating scale on presentation evaluation form	• Observation of presentation by facilitator	• Facilitator	• During Program	• Facilitator
3	**APPLICATION/ IMPLEMENTATION** • Application of new skills used when presenting to customers	• Managers will use the same presentation evaluation form.	• Observation of Manager using the presentation evaluation form.	• Manager	• Two weeks after class attendance • Four weeks after class attendance	• Sales Manager
4	**BUSINESS IMPACT** • Increase in number of presentations • Increase in closing rate • Increase in sales • Decrease sales process • Increase prospective client list through referrals.	• At least five presentations per week • Closing at least 3 of the 5 presentations • Weekly sales goal attained • Reduce cold calling by 10% due to increased referrals.	• Business performance monitoring	• Company records	• Three and six months after class attendance	• Sales Manager/Sales Assistant
5	**ROI** • 10% increase in sales	Comments:____				

Sample A - Data Collection Instruments - Level 1

Presentation Skills Workshop Evaluation

Thank you for attending this Training Workshop! We hope you will benefit from applying the knowledge and skill you gained here. We are vitally concerned with your satisfaction. Please give us feedback in the following areas and provide ***specific*** *suggestions on how we may improve this program.*

Presentation Skills for the Sales Professional	Date:
Your Name (optional)	
Email:	

A. Workshop — Needs Improvement — Excellent

Relevance to your job *Comments:*	1	2	3	4	5	6
Usefulness of Training materials *Comments:*	1	2	3	4	5	6
Amount of practice *Comments:*	1	2	3	4	5	6
Pacing *Comments:*	1	2	3	4	5	6
Quality of Training Facility *Comments:*	1	2	3	4	5	6
Overall Rating of the Workshop	1	2	3	4	5	6

What suggestions would you make to **improve this workshop**?

Over →

C. Course Leader(s) Needs Improvement Excellent

Leader's Subject-Matter Knowledge	1	2	3	4	5	6
Comments:						
Presentation Skills	1	2	3	4	5	6
Comments:						
Willingness to help	1	2	3	4	5	6
Comments:						
Organizational/time management	1	2	3	4	5	6
Comments:						
Overall Rating of the Course Leader(s)	1	2	3	4	5	6

D. Improvements/Action Plan

What suggestions for **improvement** would you make for the **Course Leader(s**)?

What are your three key **action plan** items?

How **confident** do you feel in your ability to **perform your job** as a result of this training?

Not Confident **Very Confident**

10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Comments:

Beyond Training, **what else** do you feel you need to perform your job better?

Sample B - Data Collection Instruments - Levels 2 & 3

Presentation Evaluation

Name ___________________________ **Date** ______________________

Action	Score				
Posture & Movement & Eye Contact					
	Needs Improvement				**Excellent**
Was your **eye contact** balanced in the room?	1	2	3	4	5
Was your **focus** geared more toward one side of the room?	1	2	3	4	5
How was your use of **speaker notes**?	1	2	3	4	5
Did you **stand** with **confidence**?	1	2	3	4	5
Was there too much **rocking**, **pacing**, **tapping**, etc.?	1	2	3	4	5
Gestures					
Were there any obvious **gestures** that could be avoided?	Y / N	Comments:			
Did the presentation feel **exaggerated** or **unnatural**?	Y / N	Comments:			
Voice Quality					
	Needs Improvement				**Excellent**
Rate?	1	2	3	4	5
Articulation? *Clear & Concise?*	1	2	3	4	5
Volume?	1	2	3	4	5
Verbal fill ins? *Uh, umm, okay…*	Y / N	Comments:			

Questioning Techniques		
Were a variety of **questioning techniques** used?	Y / N	Comments:
Were the **questions repeated** for others to hear?	Y / N	Comments:

The Close		
Did the **close revisit content**?	Y / N	Comments:
Did the **close** create an **action plan**?	Y / N	Comments:
Did they **close** the **deal**?	Y / N	Comments:

Three Things You Did Well

1. ______________________________
2. ______________________________
3. ______________________________

Three Things You Can Improve for Next Time

1. ______________________________
2. ______________________________
3. ______________________________

Data Collection Instruments Description

Sample A, the Presentation Skills Workshop Evaluation, is designed to capture the attitude of the learner immediately after the class is completed. A Lickert scale of 1-6 is being used to make the learner commit one way or the other on the topic (needs improvement or excellent). The first section (section A) is designed to focus on the workshop itself. The second section (section B) is designed to ask a question for suggestions to improve the workshop. The third section (section C) is focused on the course leader. This allows management to understand if the scores reflect positively or negatively on the instructor. The fourth and final section (section D) is regarding suggestions to improve the overall course, create an action plan, confidence in using the material and future programs that might be useful. This area is designed to get the student thinking about the future. Asking them to estimate the confidence they feel the training impacted their ability to do their job gets the student used to making estimates. In the future other questionnaires will be sent asking them to estimate further training impact.

Sample B, the Presentation Evaluation Sheet, is designed to be used by the students and the instructor to give feedback to the students immediately after their first and second presentation. It is designed to make them aware of some of the skills they did well and skills they need to improve upon. The Sales Managers will also use this during their assessment of the presentations after one month, three months, and six months of the training. It can also be used long term to assist in presentation evaluations.

ROI Analysis Plan

Program: Presentation Skills for the Sales Professional **Consultant:** Laura Swidorski **Date:**______________

Data Items	Methods for Isolating the Effects of the Program	Methods of Converting Data to Monetary Values	Cost Categories	Intangible Benefits	Communi-cating Targets for Final Report	Other Influences/ Issues During Application	Comments
• Increase in number of presentations (At least 5 presentations per week) • Increase in closing rate (Close at least 3 of the 5 presentations) • Increase in sales (Weekly sales goal exceeded or attained) • Decrease Sales Process • Increase # of calls (Reduce cold calling by 10%) • Increase prospective client list through referrals (Increase current client list by 5% by end of quarter)	Control Group Historical Data	Weekly feedback reports written by salespeople compared to before the training (number of pres. given & cold calling) Sales numbers Client list by salesperson	Travel & Entertainment Participant salaries Course materials Trainer fees (outside consultant) Administrative Support Lunch/snacks for participants Evaluation	Increase job satisfaction Increase confidence in salespeople Improve company image through excellent presentations Improve camaraderie amongst sales staff	President Vice Presidents Sales Executives Participants HR staff	Participants must have buy in to the program Consistency of message and delivery of training a must Follow-up by sales management staff required for successful evaluation process	Cooperation by sales executives is absolutely necessary for the evaluation process to be successful Administrative staff will be responsible for collection of data

Part IV: Estimate of Program Costs & Benefits

Cost Estimates

For budgeting purposes, estimates for the workshop are as follows:

Development Costs		
Analysis Item	**Itemized Cost**	**Total Cost**
Consultant Fees		
▪ Development of Course	$12.00	$3,000.00
Materials and Supplies		
▪ Course workbooks @ 250 HC	$10.00	$2,500.00
▪ Instructor Guides @ 5 HC	$50.00	$250.00
▪ Evaluation Sheets @ 1000	$.5	$500.00
▪ Printing fees for DVD covers	$.10	$1,000.00
▪ Workshop Evaluation Handouts @ 250	$.5	$125.00
Office Supplies		
▪ Notepads & Binders @ 10 Instructors	$5.00	$50.00
Total Development Costs		*$7,425.00*
Delivery Costs		
Analysis Item	**Itemized Cost**	**Total Cost**
Salaries		
▪ Trainer @ 20 days	$1,000.00	$20,000.00
▪ Facilities	N/A	N/A
▪ IT person for assistance @ ½ hr per day	$25.00	$500.00
Office Supplies		
▪ Flip Charts @ 1 per class @ 20 classes	$7.50	$150.00
▪ Presentation DVD @ 250 HC	$2.50	$625.00
▪ Notepads and pens	$.50	$125.00
Lunch & Snacks	$6.00	$1,500.00
Equipment	N/A	N/A
Total Delivery Costs		*$22,900.00*
Evaluation Costs		
Analysis Item	**Itemized Cost**	**Total Cost**
Salaries		
▪ Trainer @ 20 HC*	N/A*	N/A*
▪ Administrative Assistant @ 1 hr per class	$10/per hour	$200.00
▪ Sales Managers Evaluation Time @ ½ day per sales person	$400.00	$100,000.00
▪ 250 Full commission participants – loss of sales during day of training	Amount Unknown	
Total Evaluation Costs		*$50,200.00*
Total Costs		**$130,525.00**

* Head count for trainers already accounted for in delivery costs.

Benefits Identification

Tangible Benefits

- Increase in number of presentations (At least 5 presentations per week).
- Increase in closing rate (close at least 3 of the 5 presentations).
- Increase in sales (weekly sales goal exceeded or attained).
- Decrease sales process.
- Increase number of calls (reduce cold calling by 10%).
- Increase prospective client list through referrals (increase current client list by 5% by end of quarter).

Measurement - History shows when a salesperson increases their call activity and decrease cold calling, sales increase by 10%. The average salesperson (for one particular customer) has approximately 100 accounts, with average sales of $30,000.00 per account annually. ($30,000.00)(10%) (100) = $300,000. If each sales person (250 salespeople) was able to increase their sales by 10% annually (based on the tangible benefits listed above), the company sales force would increase sales by over **$74,000,000.00** (10% increase over last year) in FY 2007.

Intangible Benefits

- Increase job satisfaction
- Increase confidence in salespeople
- Improve company image through excellent presentations
- Improve camaraderie amongst sales staff

Measurement – Conduct a focus group with Sales Management staff and participants (separately) to understand benefits of training and impact of the training class. I will also create a survey to be conducted at 3 months and at 6 months after the class. This will help with estimated ROI for intangible benefits.

Bottom Line - After taking into account the costs to create, deliver and evaluate and assuming the 10% increase in sales was met, the net benefits for this company could be **$74,864,475.**

Exhibit #3 – Presentation Skills for the Sales Professional Workshop

Part I - Overview

Instructional Goal Statement

In a Presentation Skills class, salespeople will demonstrate the use of proper voice inflection, good questioning techniques, convey body language, and create a supportive learning environment when conducting effective product presentations to their clients.

Domain of Learning

Executing a good presentation should be classified as a psychomotor skill since both mental planning and physical presentation of the plan are required to convey the essence of the product presentation. Neither planning a presentation nor reading words off a screen will effectively accomplish the goal. Rather, preparation and planning, combined with effectively executing the presentation are required. Executing a good presentation requires practice. The only way one knows how to present well is to practice voice inflection, proper body language, excellent questioning techniques and proper use of visual aids.

Goal Analysis

1. Prepare a presentation using Microsoft PowerPoint. (v)

- 1.1. Know your material.
  - 1.1.1. Understand the information that is MOST important.
  - 1.1.2. What information do they need to know vs. what is nice to know?
    - 1.1.2.1. Focus on the information the clients need to know if you are pressed for time.
- 1.2. Know your audience.
  - 1.2.1. What is their experience level?
    - 1.2.1.1. If the audience is experienced, give an overview of the information.
    - 1.2.1.2. If the audience in inexperienced, go into more depth.
  - 1.2.2. What is their language ability?
    - 1.2.2.1. If there are language barriers, have an interpreter.

1.3. Effectively review product information
    1.3.1. Define the product and how it is used.
    1.3.2. Review the features and benefits.
    1.3.3. Is there special information that would be important to each specific customer?
        1.3.3.1. If yes, incorporate that information into your presentation.

- Entry Behavior – Complete understanding and use of PowerPoint.

2. Presentation Techniques

2.1. Proper use of voice inflection to engage participants.
2.2. Practice using different questioning techniques to elicit participation.
    2.2.1. Open
    2.2.2. Closed
    2.2.3. Rhetorical
    2.2.4. Polling
    2.2.5. Direct
2.3. Use body language to effectively convey the point.
    2.3.1. Use of Arms
    2.3.2. Stance
    2.3.3. Facial Expressions
    2.3.4. Posture

3. Close the deal! (v)

3.1. Review the information provided.
3.2. Ask for the business!

- Entry Behavior – Selling skills

Part II - Learner Analysis

Information Categories	Data Sources	Learner Characteristics
1. Entry behaviors	**Interviews:** HR Director, Director of Sales (Manager), VP of Sales.	**Performance Setting:** Each salesperson will have completed a PowerPoint training session the week prior to this training. At the end of the PowerPoint training they are asked to create a two part presentation: 1) Introduce yourself to your peers. Tell them about you and your family from a personal perspective 2) Introduce yourself on a professional level. Discuss your past experiences, your educational background, and your future goals. This PowerPoint file will be used in the Presentation Skills class the following week.
2. Prior knowledge of topic area	**Interviews:** Director of Sales (Manager's), VP of Sales.	Learners will have prior sales experience, either formal sales training and/or on the street experience. However, their prior knowledge of proper presentation skills is extremely limited. Learners have general knowledge of presenting in front of customers, but most of them have had no formal training.
3. Attitudes toward content	**Interviews:** Director of Sales (Manager)	Many of the learners are apprehensive about presenting in front of a group of their peers, but are relieved to know that their manager will not attend the training. This is to make sure the learners do not feel their job is threatened while they are learning a new technique.
4. Attitudes toward potential delivery system	**Interviews:** Director of Sales (Manager)	For the most part the learners believe the skills taught will be relevant to their job. They are confident the new skills will help them close more deals. Anything to help them increase sales will assure they are attentive in class.

<table>
<tr>
<td>5. Motivation for instruction (ARCS)</td>
<td>Interviews: Director of Sales (Manager)

Questionnaire: Random sampling questionnaire given the previous week during computer training.</td>
<td rowspan="4">Education Levels: Learners all have an undergraduate degree (younger target population) or equivalent field experience (older target population). An undergraduate degree (or equivalent) is a prerequisite for becoming a sales representative. None of the salespeople have graduate level experience.

Ability Levels: Salespeople by nature are social beings. They love to talk, especially about themselves. This is the reason the topics of the presentations is their personal and professional background. They are professionals in regards to knowing their own history. This allows the learner to focus on their presentation skills rather than the information at hand.

Some of the learners have been in sales longer than others; however they are all rookies when it comes to presenting with a PowerPoint presentation in front of a group. Salespeople are used to one-on-one role playing, in some form, in their weekly sales meetings.

Learners are used to a lecture/discussion style of training, but are excited about the idea of the case study, small group discussion, presenting, and getting verbal and video feedback from the instructor.

The Learners are extremely receptive to any form of training since the previous sales leadership team did not provide much. The new leadership team believes strongly in training, thus the reason for computer training and presentation skills training. In the near future a formal sales training and negotiation skills training program will take place within the organization to make sure everyone is on the same page. This will also allow the sales leadership team to use terminology and sales jargon within the organization that everyone understands.</td>
</tr>
<tr>
<td>6. Educational and ability levels</td>
<td>Interviews: Director of Sales & HR Director

Records: Resume's</td>
</tr>
<tr>
<td>7. General learning preferences</td>
<td>Interviews and Observations: Information gathered from Director of Sales and Salespeople.</td>
</tr>
<tr>
<td>8. Attitudes toward training organization</td>
<td>Interviews: Sampling of learners during computer training (verbal).</td>
</tr>
</table>

9. General group characteristics a. Heterogeneity b. Size c. Overall Impressions	**Observations:** Getting to know the students during the computer software training which lasts for 4 days.	**Heterogeneity:** Learners are fairly heterogeneous in that there are mostly men (80/20). The men vary widely in ages, from late 20's to late 60's. They are all mostly white, with few exceptions of Asian Americans and African Americans. The women are again mostly white with only one exception of African American. They vary in ages from late 30's to late 50's. **Size:** There will be a total of 10 classes of 7 salespeople per class. This will allow plenty of time for the two presentations and feedback within the time allotted. **Overall Impressions:** The group is not used to sitting, so the class will need to be fast paced and highly interactive. Keeping salespeople focused for any length of time is challenging. Since the training will be conducted within the headquarters building, keeping the learners reined in and on time will be important to the success of the class.

Terminal Objective

During a sales presentation to a customer, the Learner will present with confidence the features and benefits of their company, products and themselves. Present this information using 1) good voice inflection 2) good questioning techniques and 3) good body language. The presentation must be presented in an environment conducive to learning. Reviewing the information, at the end, will solidify the sale.

Behavior Objectives

Steps	Matching Behavioral Objectives
1. Understand what information should be in a PowerPoint Presentation.	1. Given the learner's personal and professional background, they must prepare a presentation keeping in mind 1) what is most important 2) what the audience needs to know 3) what the experience level of the audience is 4) what the audience's language ability might be and 5) the product information. Given the appropriate sales brochures, define the product and present the appropriate features and benefits to the customer. The learner will use this presentation and sales brochures during class while practicing the new presentation skills they will learn.
2. Proper use of voice inflection to engage participants.	2. The learner will Identify proper use of voice inflection by practicing their presentation in front of the class. Using the Voice Quality portion of the Presentation Evaluation Worksheet (see below), the instructor will give written and oral feedback, while the other students will give oral feedback to the learner.
3. Practice using different questioning techniques to elicit participation.	3. The learner will demonstrate proper use of questioning techniques by practicing their presentation in front of the class. Using the Questioning Techniques portion of the Presentation Evaluation Worksheet (see below), the instructor will give written and oral feedback, while the other students will give oral feedback to the learner.
4. Use body language to effectively convey the point.	4. The learner will demonstrate the use of good body language to effectively convey their point to the audience. Using the Posture, Movement & Eye Contact portion of the Presentation Evaluation (see below), the instructor will give written and oral feedback, while the other students will give oral feedback to the learner.

5. Create a good learning environment for the client.	5. Given the appropriate amount of time to prepare, the learners will work in groups to prepare a list of items required for the client to have a good learning environment. The groups will then present their findings to the entire class creating a list on flip chart paper.
6. Close the deal!	7. Given a sales situation, the learner will review the information thoroughly, answer any questions, and then ask for the order. The sales figures will be calculated in one month, three months and six months to evaluate the impact of the course.

Assessment Plan

The attached Presentation Evaluation rubric is designed to be used twice during the Presentation Skills class. The evaluation will be used once prior to any instruction. The learner will use the Part One of their presentation. Then the content of the class will take place. Each Learner will be asked to present the Part Two of their presentation, then be evaluated a second time using the evaluation. (If you recall, Part One is about the Learner's personal background and Part Two is about the Learner's professional background.) After each presentation, the Learner will be given written and oral feedback from the instructor and oral feedback from the other students.

To see the impact of the class to the bottom line, sales figures will be calculated before class begins, then one, three and six months after the class. This will give us the opportunity to evaluate if the Presentation Skills course impacted bottom line sales.

I don't believe a test was appropriate for this Psychomotor Skill. In using the evaluation worksheet as a guide, the Learner is getting immediate feedback. The Learners are then able to apply the feedback to their second presentation. Their manager is given a copy of their final Presentation Evaluation so the Manager can coach the Learner as to what they need to work on in the near future.

Presentation Evaluation

Name _____________________________Date _________________________

Action	**Score**				
Posture & Movement & Eye Contact					
Was your eye contact balanced in the room?	1	2	3	4	5
Was your focus geared more toward one side of the room?	1	2	3	4	5
How was your use of speaker notes?	1	2	3	4	5
Did you stand with confidence?	1	2	3	4	5
Was there too much rocking, pacing, tapping, etc.?	1	2	3	4	5
Gestures					
Were there any obvious gestures that could be avoided?	Y / N	Comments:			
Did the presentation feel exaggerated or unnatural?	Y / N	Comments:			
Voice Quality					
Rate?	1	2	3	4	5
Articulation? *Clear & Concise?*	1	2	3	4	5
Volume?	1	2	3	4	5
Verbal fill ins? *Uh, umm, okay…*	Y / N	Comments:			
Questioning Techniques					
Were a variety of questioning techniques used?	Y / N	Comments:			
Were the questions repeated for others to hear?	Y / N	Comments:			

The Close		
Did the close revisit content?	Y / N	Comments:
Did the close create an action plan?	Y / N	Comments:
Did they close the deal?	Y / N	Comments:

Three Things You Did Well

1. ____
2. ____
3. ____

Three Things You Can Improve for Next Time

1. ____
2. ____
3. ____

Part III - Instructional Strategy / Instructor Directions

Pre-Instructional Activities

Classroom Setup

Conducting a successful Presentation Skills class takes a lot of prep work. Below is a list of things that need to take place prior to the beginning of class.

- Prepare flip charts in advance
- Prepare and review presentations
- Setup projector
- Check lighting
- Check temperature of room
- Lay out workbooks, pencils, and post it notes
- Set up DVD recorder and position accordingly in room
- Practice recording someone talking to confirm location of DVD recorder
- Set up DVD player and headphones in the back of class
- Obtain small prizes like scratch off lottery tickets to reward good answers
- Have hand outs ready and available (including workbook for students, Incorrect Gestures Activity and the Presentation Evaluations- two per student)

Motivation

Prior to main step 1, "Prepare a presentation using Microsoft PowerPoint," the instructor will welcome the participants and review logistical information:

- Break times / Lunch / End time
- Location of the restrooms
- Class rules
    - There are no dumb questions
    - Be open to suggestions and constructive criticism
    - Support your classmates with your attention and eye contact
    - No blackberries, computers or phone usage during class unless instructed

Once the logistical information is covered, the instructor asks the group this question: “What are The Five Worst Human Fears?” The instructor lists what the group says on a flip chart, reveals The Five Worst Human Fears listed in the PowerPoint presentation.

The purpose of this exercise is to show the group they are not alone when it comes to being nervous speaking in front of a group. In fact most people do not like it at all. They would rather die first (based on the list!). The purpose of the class is to take the fear out of public speaking. There are easy tips and tricks to make any presentation, big or small, the best it can be!

Objectives

The behavioral objectives will be listed on a PowerPoint slide. The instructor will review them with the class and ask if there are additional objectives they wish to get from the session. These additional objectives will either be accepted or rejected by the instructor based on their ability to cover the content. If at the end of the day there is time, the information will be covered if the instructor is comfortable with the topic requested.

Prerequisite Skills

The Introduction to PowerPoint class is a prerequisite to the course. The use of PowerPoint will be reviewed, as needed, during the presentation section of the class as to not put a student in an uncomfortable situation.

Assessment

Pretest

A two to five minute “Pre” presentation will be given prior to the major skills section of the course. The participant will be video taped during their presentation. They will be given oral feedback from their peers and written feedback from the instructor (see *Presentation Evaluation* rubric). The student will watch their DVD immediately after they have presented. This will give them the ability to see themselves in action. Often times it opens their eyes to the areas they need to improve.

Post Test

A two to five minute "Post" presentation will be given by the students. This will give them the opportunity to practice what they have learned and apply the new techniques immediately. The student will be video taped. Each student will be given oral feedback from their peers and written and oral feedback from the instructor. The student will watch the second DVD on their computers after the class is completed.

Follow-through Activities

Memory Aid

The students will be given a workbook to use during class. This workbook can be used after the class as a reference tool. There are many tips and tricks included in the workbook.

Transfer

Each student's manager will be given the Presentation Evaluation rubric as a tool to evaluate their people. Each manager will be asked to attend a presentation and evaluate the student within 30 days of attending the class. This will reinforce the use of the new skills learned.

Objective 1 – Prepare A Presentation Using Microsoft PowerPoint

Student Participation

1. Break the entire group into sub groups of three to four people. Have each sub group discuss the answer to this question, "What are the elements of a great presentation?" Have each group report out and record the answers on a flip chart. Once the groups have reported out give the following information:

- 90% of the time we listen with understanding
- 20% of the time we listen with retention
- The average time of a TV show between commercials is only 8 minutes!

We have so much going on in our lives that our attention span has deteriorated. There needs to be lots of interaction within a presentation to keep people engaged! Try to interact with people every 8 minutes and NEVER lecture longer than 20 minutes.

2. Review the section within the workbook called, “10 Key Characteristics of a Good Presenter.”

3. Review the section in the workbook called, “Reasons to be shot as a Presenter.”

Content

Review the information in the workbook called, “Creating a PowerPoint Presentation.” This section includes the following”

- General Design Tips
- Font Style and Size
- Text with Graphics
- Graphics
- Charts
- Where to stand when delivering a presentation

Student Participation

Ask each participant to take 10 minutes to review their PowerPoint presentations (this was given as pre-work). Have them apply the changes to their presentation based on the information they just learned in class. They will use the rubric in their workbooks called, “*Reviewing Your PowerPoint Presentation*.” (See below.)

Reviewing Your PowerPoint Presentation

Ask the following questions to yourself when reviewing your presentation.

Grammar	✓ **When Completed**
1. Used words that send a clear message?	
2. Avoided commonly confused words?	
3. Used correct grammar and punctuation?	
4. Checked (and re-checked) my spelling?	
Graphics	
5. Used the same font type through the entire presentation?	
6. Avoided flashy transitions, sounds and animations?	
7. Ensured at least 50% blank space per page?	
General	
8. Used phrases or bullets rather than complete sentences?	
9. Aligned all text to the left margin?	
10. Ensured my wording is clear, concise, and complete?	

Feedback

The instructor should walk around the room asking quietly if people need any help. Positive reinforcement should be used after assistance is given.

Content

Review the content provided in the workbook:

- Know your Audience
  - Knowledge
  - Interest
  - Language
  - Influence
- Know the 5W's
  - Who
  - What
  - Where
  - When
  - Why

Student Participation

Have the students determine the details for their presentation by answering the 5W's. Use the section in the book called, "5W's Exercise." (See below.) Break the group into groups of two. Ask the groups to practice introducing themselves using the 5W's. This will allow them to start using their voice and get more comfortable introducing themselves in front of a group.

- **WHO** are you going to present to?
- **WHAT** are you going to talk about?
- **WHEN** will the presentation be over (how long will it take)?
- **WHERE** are you going to do the presentation?
- **WHY** are you doing the presentation?

Feedback

Positive reinforcement should be given to participants with a smile as the instructor walks around and listens to the small group practice session. The instructor should help people as needed to clarify any questions.

Content

Review the information provided in the workbook called, "Openers and Tension" and "Four Levels of Socialization." This section discusses the importance of understanding how people come into a meeting or training session with their own tension. Tips and tricks are given and discussed in the group to reduce this tension in the room.

Student Participation

The workbook is written so that the student has to fill in the answers to much of the workbook. They will need to pay attention throughout the day to fill in their workbook and make it complete. Here is an example,

People come into the room with three kinds of tension:

- ✓ Task Tension (Will I be able to do what is asked of me?)
- ✓ Relationship Tension (Will I ask a dumb question/do a dumb thing/be humiliated?)
- ✓ Personal Tension

The right opener could reduce these tensions.

Three Tension Reducers:

1.
2.
3.

Feedback

The instructor should give rewards for good answers with a small prize.

Transfer

Each student is now asked to get up and give Part One of their pre-work. This is the presentation they created to tell the group about their personal life outside of work. They might tell us where they grew up, where they attended college or how they met their spouse. They will be video taped and given feedback during this exercise. They will also watch themselves on a DVD player with headphones immediately after they receive their feedback. Each presentation with feedback takes between 15 and 20 minutes.

BREAK

Have a break at this time. Depending on the number of participants this will probably be lunch time. Have one person from each sub group be responsible for getting everyone back on time. The group that is back in their seats first, when lunch is over, wins a prize. This will encourage a bit of competition and puts the onus on someone else to rally the troops.

Student Participation (icebreaker after the break)

Have each person fill in the blanks to the section in the workbook called, "*The Power of Repetition*" as they return to class after the break. This activity asks the student to recall popular advertising jingles they would have seen on television. For example, "We love baseball, hot dogs, apple pie and Chevrolet." This activity gets the student thinking again and it reinforces the fact that when we hear something over and over again, we remember it!

Objective 2 – Presentation Techniques

Content

Use the workbook to cover the following information:

- The message
- Eye contact
- Posture and movement
- Gestures
- Voice
- Handling Mannerisms that distract

Student Participation

Each student is given a piece of paper with improper presentation techniques. For example, some improper presentation techniques would be; swaying from side to side, pacing, looking at the floor or talking too softly. Each student is then asked to go to the front of the room and act out the improper presentation technique. After the improper technique is shown, we discuss, as a group, why the technique is improper. We then go into a discussion about what the proper technique looks like or sounds like. This activity allows the student to get in front of the class a second time. However, this time the students are having fun and laughing. Hopefully this takes away some of the tension and creates a bond within the group. It also allows the instructor to review the content in a fun way. As the instructor reviews each section of the book, the student is again writing the core content into their workbook. Each improper technique corresponds sequentially with the information in the book.

Feedback

The instructor should offer encouragement and enjoy the laughter and fun. This is a great activity!

Content

Use the workbook to assist in reviewing good questioning techniques. There are many good questioning techniques. The following types of questions are defined in class:

- Open
- Closed
- Overhead
- Direct
- Relay
- Ricochet
- Rhetorical
- Polling
- Combined

Student Participation

Have the large group break into their sub groups again. Have them answer the following question, "How can you encourage questions?" Once they have discussed the answer in the sub group, the instructor will create a master list on a flip chart.

Feedback

The instructor should walk around the room and listen in on the sub group (s). Offer suggestions to the groups that might be having trouble. Offer praise to the groups that are doing a great job!

Objective 3 – Close the Deal

Student Participation

Have the group throw out ideas as a large group on ways to close the deal. The workbook offers three areas to focus on:

1. Revisits content
2. Creates an Action Plan
3. Closes the Deal

These three bullet points offer opportunity for discussion. Have the groups list in their book the answers from the group.

Feedback

The instructor should offer suggestions and offer praise to good ideas.

Transfer

It is now time for the students to practice Part Two of their presentations. Part Two was part of their pre work as well. This presentation is a summary of their professional life. For example, they might talk about their first job out of college and what their career has been like up to this point.

Give the students 10 minutes to review their presentations before they give them. Again, the students will be video taped and will be given oral and written feedback. They will also be given a DVD with both of their presentations on it.

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