IntRAtrain Sales
Learner's Development Guide
New Salespeople

Welcome to the IntRAtrain
Sales Development Program!

Employees are the most important asset of every business. Without you, nothing would function effectively, efficiently, or profitably. Thus, it is important to IntRAtrain to provide you the tools and resources to ensure you work at your optimum performance level so you can realize your full potential. That is why we developed this program.

How it Works

It's easy to get started. And, you have options available to you. You have been identified as someone your manager wants to be involved in this system. First, you will complete an Employee Self- Assessment to identify your strengths and where improvement might be indicated for various attributes. Your manager will also complete an assessment of you and then will do a side-by-side comparison which will indicate where there are differences between your evaluation and the manager's evaluation of you and the desired skill level. The results will be used in designing an Individual Learning Plan (ILP) for you.

If that sounds complicated, don't worry! The assessment is available on-line. It is easy to access and complete. After the assessments are completed you and your manager will discuss the assessments and talk about differences in how each of you may have evaluated the attributes.

Based on your evaluations, you and your manager will agree on the courses necessary to bring you to a higher skill level in the various attributes. From the available library of courses, workshops, and other resources, you and your manager can select those that will have the greatest positive impact on your outcome. This will then become your Individual Learning Plan.

Again, don't worry; the courses that comprise the development program for each of the positions are laid out for you in "bundles". All of the courses listed in the bundle can become part of the requirements for your development and can be accessed or scheduled from the learning management system.

After the Individual Learning Plan is completed and you are set up in the system, you are empowered to take charge of implementing the program and managing your own development. That means you take responsibility for setting up meetings with your manager/coach, completing courses, attending on-site and web-based instructor-led training, completing projects, etc. This is all laid out for you in your Learner's Guide, which is also available for viewing and printing from the website. Also included is a matrix that illustrates a recommended process for the first year.

Your manager/coach will help ensure you stay on track and continue to work toward the goals set up in your Individual Learning Plan. How will he/she do this? By following the Manager's/Coach's Guide provided with the program, he/she will monitor your progress, ask questions, and offer constructive feedback and evaluation. This is important to ensure you know how you are doing on this journey and to know when you've reached your destination. If you have questions, need advice or reassurance, talk to your manager/coach. They are there to help you along the way.

IntRAtrain Sales Development Program Process Matrix

New Salespeople

	Type of Activity	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
Web conference with Instructor, host													
Meet with Supervisor, expectations, development process	Acct.	Week 1											
Map out and complete Orientation Process	Acct.	Week 1											
Create Individual Learning Plan	Acct.	Week 1-3											
IntRAtrain Web Conference - sales development process	Web, Seller	Last Friday each month											
Complete Fundamentals of IntRAtrain Sell Through Needs & Relationships	Online, Seller	Week 3-7											
Web Conference - STNR review, discussion, questions, assignments	Web, Seller		Last Friday each month										
Web Conference - Results, discussion, key activities for this time of year	Web, Seller			Week 10									
IntRAtrain Sell Through Needs & Relationships	Instructor Led session			Week 10-20									
Start 21 day practice	Seller			Week 11-21									
10 days after IntRAtrain Sell Through Needs & Relationships, web conference, results, next steps	Web, Seller			Week 12-22									
Quarterly web sales conferences - sales priorities, challenges	Web, Seller			Last Friday of Month			Last Friday of Month			Last Friday of Month			Last Friday of Month
Push Email Sales Support	Email	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday	1st Monday

LEARNER'S ACTIVITY GUIDE – NEW SALESPEOPLE

Learner's Activity Guide - The purpose of the Learner's Activity Guide is to guide you, the learner, through the learning and application of the New Salesperson On-Boarding Process. This Learner's Activity Guide allows you to take the responsibility for learning and application of skills and processes. It directs you to the specific activities necessary for you to continuously enhance your sales effectiveness. The Learner's Activity Guide will tell you when to schedule meetings with your manager and the purpose of those meetings. Your manager will have a Manager's/Coach's Activity Guide to help him/her prepare for the meetings with you.

Learning Activity	**Plan**	**Date Started**	**Date Complete**
Meet with your Supervisor to: ☐ Learn what is expected of you as a salesperson. ☐ Learn the orientation process. ☐ Review your Employee Assessment results. ☐ Set up a timetable for completing and agreeing on your Individual Learning Plan/	Week 1		
Complete your orientation process.	Week 1		
Complete your Individual Learning Plan.	Weeks 1-3		
Schedule a meeting with your manager/coach to discuss your Individual Learning Plan process.	Weeks 1-3		
Meet with your manager to agree on your Individual Learning Plan. Also, schedule dates and times with your manager for all key meetings as well as dates for IntRAtrain Sell Through Needs & Relationships. The first meeting should be after the intRAtrain Web Conference.	Weeks 1-3		
Schedule your observation joint sales calls with experienced salespeople. Make sure it is one of their Key Accounts and the salesperson provides you with a copy of his/her Key Account Action Plan (copy in attached "tool kit"). Have the experienced salesperson discuss his/her Key Account Action Plan with you prior to the call; take your notes during the call using the Diagnose the Call section of the Key Account Action Plan; and after the call, you present your Diagnose the Call notes first to use as a basis for developing your call planning and diagnosing skills. Let the experienced salesperson know this is part of the new salesperson on-boarding process.	2 - 12		
Prepare for INTRATRAIN Web Conference - sales development process. Complete the ***Self-Reflection Worksheet*** (in attached "tool kit") to prepare for the Web Conference.	Last Friday of your first month		
Participate in the INTRATRAIN Web Conference - sales development process. Use your completed ***Self-Reflection Worksheet*** to participate in the Web Conference.	Last Friday of your first month		
Meet with your manager to discuss your completed ***Self- Reflection Worksheet*** and to present a summary of the key things you learned from the intRAtrain Web Conference.	Within 3 days of intRtrain Web Conference		
Complete Fundamentals of Selling (FOS - intRAtrain online).	Week 3-7		
Schedule a meeting with your manager to identify and complete a Key Account Action Plan for your first sales call, which will be a joint sales call with your manager.	Within 3 days of completing FXSS		
Apply FOS skills on your sales calls. Use the Key Account Action Plan to prepare for and diagnose your calls, also, begin using and continue using your ***Salesperson Application and Development Log*** (in attached "tool kit')	Week 4 and continuous		
Make your first sales call with your manager. Use the Key Account Action Plan to prepare for your next call and diagnose the call.	After completing FXSS		
Prepare for intRAtrain Web Conference - FOS review, discussion, questions, assignments; be ready to discuss key FXSS concepts and skills; to ask questions you	Last Friday each month		

have. Complete the ***Self-Reflection Worksheet*** (in attached "tool kit") to add to your preparation for the Web Conference.			
Participate in intRAtrain Web Conference - FOS review, discussion, questions, and assignments. Use your completed ***Self-Reflection Worksheet*** to enhance your participation in the Web Conference.	Last Friday each month		
Meet with your manager to discuss your updated ***Application and Development Log***; your completed ***Self-Reflection Worksheet;*** and to present a summary of the key things you learned from the intRAtrain Web Conference.	Within 3 days of INTRATRAIN Web Conference		
Take your manager with you on joint sales calls at least once each week. Make sure you have completed a Key Account Action Plan for the call and that your manager has a copy of the plan before the call.	8 - 52		
Prepare for intRAtrain Web Conference - Results, discussion, key activities for this time of year by making sure your ***Salesperson Application and Development Log*** is current; by being ready to discuss your progress against goals and expectations; and by having identified your planned key activities.	Week 9		
Participate in intRAtrain Web Conference - Results, discussion, key activities for this time of year by discussing your ***Salesperson Application and Development Log***; discussing your progress against goals and expectations; and presenting your planned key activities.	Week 10		
Attend IntRAtrain Sell Through Needs & Relationships Instructor-Led Session.	During Weeks 10 - 20		
Start 21-day practice upon completion of IntRAtrain Sell Through Needs & Relationships. Work with your learning partner and coach(s) to practice skills.	Weeks 10 – 21		
Upon completion of IntRAtrain Sell Through Needs & Relationships, apply IntRAtrain Sell Through Needs & Relationships skills on your sales calls and log your results in your ***Salesperson Application and Development Log.***	Continuously		
Upon completion of IntRAtrain Sell Through Needs & Relationships, schedule a meeting with your manager; prepare for the meeting with your manager and for the upcoming web conference by being prepared to present and discuss the key concepts and skills from IntRAtrain Sell Through Needs & Relationships and your ***Salesperson Application and Development Log.***			
Meet with your manager to present and discuss the key concepts and skills from IntRAtrain Sell Through Needs & Relationships and your ***Salesperson Application and Development Log.***			
Participate in web conference, results, next steps using concepts and skills from IntRAtrain Sell Through Needs & Relationships and your ***Salesperson Application and Development Log.***	10 days after IntRAtrain Selling		
Meet with your manager <u>weekly</u> to discuss your updated ***Application and Development Log*** and a completed ***Self-Reflection Worksheet.*** For your meeting after the intRAtrain Web Conference, include discussion of the key things you learned from the intRAtrain Web Conference.	Weeks 12 - 24		
Participate in Quarterly web sales conferences - sales priorities, challenges.	Last Friday Month 3		
Participate in Quarterly web sales conferences - sales priorities, challenges.	Last Friday Month 6		
Participate in Quarterly web sales conferences - sales priorities, challenges.	Last Friday Month 9		
Participate in Quarterly web sales conferences - sales priorities, challenges.	Last Friday Month 12		
Apply key ideas from Sales Support Email – First Monday of each month	Months 1 - 12		

TOOL KIT

Sales Skills Development Feedback

Self-Reflection Worksheet – Need Help

Use the format below to write a summary of a situation that did not go well and for which you would like help from your manager, mentor, or intRAtrain coach.

Circumstance – what was the situation?	**Response –** What skills did you use and how did you use them?	**Outcome –** What was the end result? What is going to happen next?

How will you use what you have learned in future situations?

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Self-Reflection Worksheet – Share Success

Use the format below to write a summary of how you used the skills and the outcomes of your on-the-job application.

Circumstance – what was the situation?	**Response –** What skills did you use and how did you use them?	**Outcome –** What was the end result? What is going to happen next?

How will you use what you have learned in future situations?

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Salesperson Application and Development Log

Self-Rating: Rate your performance level for each of the SKILLS you use each day.

Rating Scale: 1=Poor 2=Fair 3= Good 4= Very Good 5= Excellent

Date:	Which skill(s) did I use today?	Self Rating	What do you need to do to move your performance to a 5?

Key Account Action Plan

Key Account:

Address:

City: State: Zip:

Contact person(s):

Business phone: Mobile: Email:

History of business:	Current business:

Current challenge with this account (please be specific):

Specific and achievable goal for this account (next 12 months):

Actions to help grow business with this account:

What:	Who:	When:
1.		
2.		
3.		
4.		
5.		

Current Situation with this Key Account

Based on your experience working with this account, how would you describe the customer?
(Check the most appropriate box)

Task-Oriented	☐	☐	Relationship-Oriented
Leader	☐	☐	Follower
Outgoing	☐	☐	Reserved
Risk Taker	☐	☐	Close to the Vest

Comments on style(s):____

Current relationship with this account:

☐ Outstanding ☐ We get along very well ☐ Could be better ☐ We're struggling ☐ Have yet to establish a relationship

Strategies to establish/build trust and credibility:

Account information and knowledge ***yet*** to be acquired:

Present Situation	Preferred Situation
☐ Business history / Goals	☐ What is changing?
☐ Responsibilities / Roles	☐ Future Business objectives
☐ Personal interests, recreational / hobbies	☐ Business practices / Technology adoption
☐ Personal goals	☐
☐ Supplier expectations	☐
☐ How success is measured	☐
☐ Present Challenges – Pain, Fear	☐ Consequences if problem is unresolved
☐ Areas of Desired improvements / solutions - Gain	☐ Value if problems are resolved
☐ Present business practices	☐
☐ Business challenges	*If current customer*
☐ Marketing situation	☐ Product/service likes/dislikes
☐ Decision making process	☐ Satisfaction level

Preparation for the Next Call with this Key Account

Account: Date of Call:

Action Objective:

Call Justification (purpose, process, payoff):

___

Discovery Question Map

Discovery Questions to ask:

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Offering Solutions

Presentation Strategies / Benefits Desired:

Evidence to support recommendation:

Anticipated Objections / Questions to Resolve the Objections

Diagnose the Call

Account: Date of Call:

Action objective for the call: Objective completed? ☐ Yes ☐ No

What did I learn about this key account that I did not know prior to making the call:

Discovery questions that worked the best on this call:

Discovery questions that did not work on this call:

Action opportunities / Pain, Fear, Gain were discovered: ☐ Yes ☐ No

Sales results:
What worked best during the call? Explain. (Example; call justification statement, breaking down barriers, discovery questions, gaining mutual agreement, presentation of solutions, gaining commitment, etc.)

What did not work as well during the call? Explain.

What specific ACTIONS are you going to engage in during the next call with this account that will help sharpen your skills? Please be specific.