

# Sales Training Development and Management Tracking System

Brad Foy, Pavan Haravu Ramesh, Roopashree Munegowda, and Mohana Gudur Valmiki

**Abstract**—In today's competitive world, companies need to drive the performance in every possible aspect to increase their revenues and establish as successful company. Among the various aspects, employees with the right skills play a key role in establishing customer relationships, brand value in the market and sustained economic value in companies revenue. Moreover, many published market research indicates strong correlation between sales force training and sales force performance and effectiveness. Here we are proposing to build a sales training development and tracking system to track the training courses from the idea phase to complete and deployment to the several teams. Our system contains queue based and email notifications or alert system for the status changes, performance reports, custom views for each team to view the deliverables in their work queue environment. Therefore, our sales training development and tracking system provides an advantage to the companies in accessing the sales force market readiness and design better training courses linking to their business goals.

**Index Terms**—Sales force, sales training, training development and tracking system, training management system, training deliverable

## I. INTRODUCTION

PRODUCING a better product is not enough but also the product has to be sold in the market to the customers. Furthermore, companies are facing new challenges in driving sales revenues due to market globalization, more rapid advancement in technology, increased customers awareness of various products in the market and more demand for customer satisfaction. Such challenges can be handled efficiently and drive the sales revenues by providing effective training to the sales force, which improves new skills. Companies need to focus on sales force training, if they want to sustain and drive profitability in the market (Jobber and Lancaster, 1997).

In today's market competition, personal selling and establishing as a brand and building relationship with the

customer (Weitz and Bradford, 1999; Wilson, 2000), implementing customer oriented approach to add value to the customer business (Saxe and Weitz, 1982; Flaherty, 1999) is key factor in driving the sales revenues and establishing as a brand in the market.

To achieve the above mentioned challenges sales training is crucial for the new and ongoing sales projects (Christiansen, 1996). Many of the best performing companies in the market make substantial investment in the sales force training (Dubinsky, 1996; Churchill, 1997). Many published market research indicates direct correlation between sales training and sales performance (Walker, 1977; Anderson, 1995).

## II. PROBLEM STATEMENT

Product/industry complexity is increasing faster than the technical sales force can learn. The complexity of a product or industry feature demand grow rapidly after a product is launched over the years. Knowledge assimilation of the technical sales team is unable to match the rate at which complexity of a product or its feature is increasing. This gap between product complexity or feature and knowledge assimilation creates a bottleneck for any company to drive sales revenues (Figure-1). If the sales team is unable to explain the advanced feature to the customer, these features remain unused and/or will be addressed or taken over by competitor products. Due to globalization, different product portfolio's will be dominant in various geographical areas. Each geographical area might need different focus on a product than the rest or differ in business goals. Moreover, getting the sales and training teams together in one location to organize product training can be challenging and time consuming. Furthermore, training content development and distribution to various teams across the globe can be challenging. Higher management need a platform to design and track the training content according to the changing and competitive company's business goals.

Therefore, here we are proposing a web-based training management and tracking system written in Python on Django, hosted on Pythonanywhere.

Our proposed project can streamline the sales team training content and material from inception to deployment. Salient features or advantages of our web based training system include 1). provides sales training deliverable tracking system from idea to globally available training program. 2) Queue based workflow for each team involved in the development of training content. 3) Real-time email notification regarding the

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status and progress of each deliverable. 4) Graphical real-time reports. 5) Real-time graphical dashboard showing the relative investment by topic area or product portfolio. 6) Helpful in adjusting the resource investment to match with business goals. 7) Detailed and customized operational reports for every stop along the way.

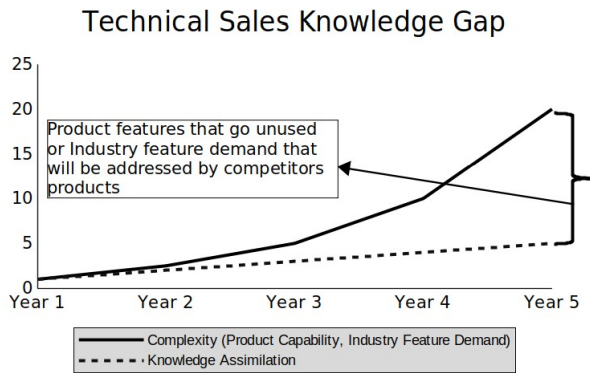


Fig. 1. Technical sales knowledge gap. Graph showing the rate of technical sales force knowledge assimilation versus increase in the complexity of a product over the duration of 5 years. The gap between the knowledge assimilation and increase in complexity will go unused if the sales team is not trained properly.

### III. PROJECT ARCHITECTURE

Our web-based training management and tracking system has six stages (Figure-2). It is a queue based workflow with real time email notification at each stage to alert the course or content developers who are responsible for the next queue.

Inception of training is initiated either by the business goals or new product launch. Training process enters into first stage of content planning and status is set to new. In the second stage, which is content development stage, outline or abstract of the training is determined by the higher management depending on the business goals. The team responsible for the video recording and processing will develop the content. Articulate processing team process the raw video and finalize the entire course of the training. At the final stage, status is set to complete and training course is deployed online.

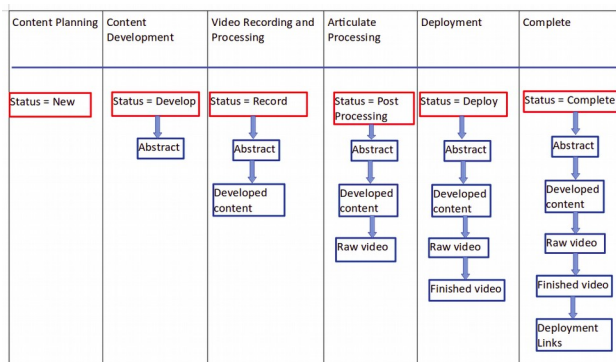


Fig. 2. Stages of training development and tracking system. Depicts the various stages of sales training from idea creation to the deployment. At each stage the status is set accordingly to the development stage it is in. Once the status is complete, that particular training will be deployed using deployment links.

### IV. PROCESS FLOW

The process of designing a training program will start by defining the clear and accurate deliverable list either based on business goals or requests. Once the deliverable list finalized “New queue” is populated with deliverables showing everything in planning and development. Content development team will set the status to “recording” and start developing the training content (Figure-3). As the recording approaching to complete, notification email will be sent to video recording and processing team to schedule the studio. Content developing team copies the file to file exchange folder according to the naming conventions. Upon completion of recording, status set to “recording complete” and these recordings are processed further. Completed file are copied to the same exchange folder. Completed files are reviewed to check for any modifications required. If required, status set to “post processing” and notification sent to articulate processing team. After the required modifications are completed, files are copied to the file exchange folder and status set to “deploy”. Notification sent to deployment team and they gather required files from the exchange folder and deploy that training. Email notification will be sent to content owner to test. If everything is proper according to the planned deliverables, file exchange folder moved to archive and the status is set to “complete”.

### V. FUTURE ENHANCEMENTS

Future enhancements and updates include the following 1) Expanded reports to indicate a) Overall schedule performance b) Schedule performance by team (category) c) Total number of hours of training in each stage of the pipeline d) Total number of hours of training in each stage of the pipeline by team (category). 2) Enhanced notifications include the following a) Detailed email notifications to each queue owner regarding change to their queue b) Notifications based on missed milestones c) Escalation emails to inform managers of missed milestones. 3) Satisfaction survey with stakeholder at the release of all training deliverables to feed improvements back into the process. 4) Drag and drop file management. 5) Data visualization reports that offers enhanced insight about training investment by category across all stages and over time.

### VI. CONCLUSIONS

We were able to successfully design and implement a sales team training and development system written in Python on Django. In our model each team involved in creation of training program has unique responsibilities to avoid confusions and early alert system to warn the team responsible for the next queue. We will continue to develop further with our future enhancements plan.

### VII. ACKNOWLEDGMENTS

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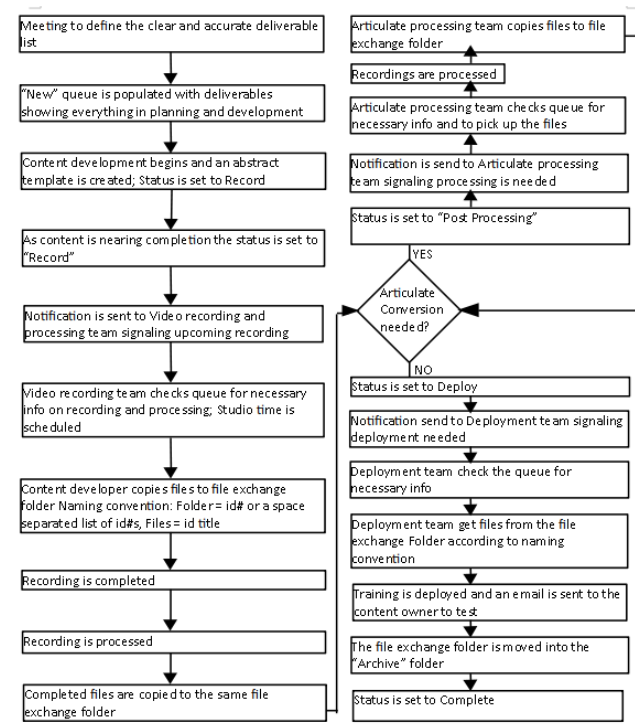


Fig. 3. Stages of training development and tracking system. Depicts the various stages of sales training from idea creation to the deployment. At each stage the status is set accordingly to the development stage it is in. Once the status is complete, that particular training will be deployed using deployment links.

## VIII. PROJECT REPOSITORY

Project web-page: <https://bradfoy.pythonanywhere.com/>

Github repository: <https://github.com/SJSU272Spring2019/Project-Group-5>

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