Instructional Design Final Project Using Salesforce.com to maintain client accounts by the sales reps of Innovation Software Inc.

September, 2017
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Project Description
The project’s purpose is to create a training module on identifying ideal leads and using salesforce.com to log leads, opportunities and maintain client accounts for the sales reps of Innovation Software Inc.

Instructional Goals
The instructional goal of this project is that post-training the sales reps will be able to:

1. Source the right types of leads by matching them with the ideal customer profile.
2. Use the Sales Cloud efficiently to manage their leads and opportunities.

Gap Analysis

Current State
The sales reps of Innovation Software Inc. are unable to reach their sales targets because they are not able to identify leads that qualify/match the ideal customer profile. They are instead identifying a large number of leads which are not potential buyers, resulting in wasted time and effort. So the sales leadership devised a methodology by putting together all the characteristics that qualify leads as prospective buyers before starting the sales process.

Added to that, the sales reps are presently using MS Excel to maintain and track their client information. This method is proving to be quite inefficient and time-consuming because of the errors associated with the manual entry like improper tracking and missed records.

To resolve these two problems, the management decided to train the sales reps on acquiring ideal leads and also to invest in a good CRM (Customer Relationship Management) for tracking and maintaining client accounts. After adequate research, they zeroed on Salesforce.com and deployed it. The training team was given the responsibility to create a basic sales prospecting training along with a hands-on Salesforce.com training for the sales reps.

Desired State
The management and the training team analyzed and listed out the advantages that the sales reps should gain after the training:

1. Acquiring quality leads, and thereby increasing their chances of closing a sale
2. Better visibility into customer information
3. Easy account planning
4. Easy data updates and collaboration

Need
The need is for the sales reps to source better leads and to use salesforce.com to log and track them for an over-all improvement in their sales efficiency.

Target Audience
The target learner’s group includes the downline sales executives who need to understand how to source better leads and then use the CRM system every day for better productivity.
**Performance Analysis**

The sales executives of Innovation Software Inc. need to acquire the skill of selecting the right type of leads that could be pursued for sales as their potential clients. To do this they need to follow a method of matching the leads with their product’s ideal customer profile. In addition to this skill, they also need to automate their lead management process through the newly acquired CRM. The below Performance relationship map will help analyze the performance problem:

Table 1 – Performance Relationship Map

| What is the problem that was originally voiced? | 1. The sales reps are not able to identify good leads that could be pursued down the sales process as prospective buyers. This is causing missed targets and decrease in the overall sales numbers. So, they need to identify ideal leads using the designed ICP.  
   2. The sales reps are using a manual system to maintain their client accounts which is time-consuming and error prone. So, they need to use the new CRM to log and maintain their client accounts. |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the voiced problem related to a core organizational outcome?</td>
<td>Yes, the generation and maintenance of leads is directly related to the overall performance and turnover of the organization. The better the quality of leads, the better will be the prospects of closing it. Similarly, working on a CRM will ensure better productivity of the sales reps.</td>
</tr>
<tr>
<td>Are there established organizational goals for this outcome?</td>
<td>Yes, the organizational goal of providing their clients with the right type of innovative software solution is directly related to generating the right type of leads who will benefit from the organization’s solution. The second goal also indirectly links to the same objective.</td>
</tr>
<tr>
<td>Is the operational goal being met?</td>
<td>Yes, as per the science of selling, sourcing the right type of leads is the first step towards closing a sale. This method is proven and highly recommended by sales teams across the globe. Similarly, Salesforce CRM has a proven record of success with the other sales teams across the industry. It will greatly improve the efficiency of the sales reps in tracking and maintaining their client’s information database.</td>
</tr>
<tr>
<td>Have the job performance standards been set for achieving the operational goal?</td>
<td>Yes, the sales reps will need to meet their targets consistently after attending this training program. Meeting their targets is the core performance component listed out on their quarterly and annual performance appraisals.</td>
</tr>
<tr>
<td>Are job performance standards being met?</td>
<td>Yes, the sales reps rely heavily on their generated leads for the entire sales cycle. They also need to keep a track of their clients</td>
</tr>
</tbody>
</table>
and maintain a history of all the communication to help them close the sale. These two performance goals will ensure that the sales reps start the process on the right foot.

<table>
<thead>
<tr>
<th><strong>Is there a job performance need?</strong></th>
<th>Yes, firstly sourcing leads and maintaining records are daily activities of the sales reps. This training will address both the areas and bring improvement in their overall sales turnover.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Are there factors outside the control of local management that are contributing to operational and job performance needs?</strong></td>
<td>Yes, for the second part of the online training, the sales reps will access the program from their work computers and smart devices from any location so a good internet connection is an important criterion for the success of the program.</td>
</tr>
<tr>
<td><strong>Are there internal factors within the control of local management that are contributing to job performance needs?</strong></td>
<td>Yes, the training team has been assigned with the responsibility to create a program. The budget approvals are done, and the basic plan is in place.</td>
</tr>
<tr>
<td><strong>Are there solutions for the performance needs?</strong></td>
<td>Yes, the first part of the training will involve a classroom intervention with an instructor and the second part of the training will happen online. The sales reps will be assigned to their superiors after the training for handholding and coaching.</td>
</tr>
</tbody>
</table>
Instructional Analysis

Identifying Subordinate and entry skills

Goal 1: Source the right types of leads by matching them with the ideal customer profile.

*Figure 1: Goal 1 analysis*

- Identify leads 1
- For each lead, identify the need by asking questions while referring to the ICP of the product that is being sold 2
- Business Problem 2.1
- Productivity loss 2.2
- Effect on Image 2.3
- Identify enabling characteristics 2.4
- Identify people/roles who are effected 2.5
  - Money 2.4.1
  - Authority 2.4.2
  - Motivation 2.4.3

Examine all the above characteristics to determine if the lead is ideal to be pursued as a prospect

*Entry Skills:*
1. Good communication required for cold calling
2. Telephone etiquette
3. Sales techniques
Goal 2: Use the Sales Cloud efficiently to manage their leads and opportunities.

1. Locate and update user profile on SF
2. Create, edit, delete and cloning accounts
3. Create a contact and relate it to the account created
4. Create an opportunity related to this contact’s account

For the purpose of this project, the goal analysis for creating, editing, deleting and cloning an account is shown in figure 2 below:

Figure 2: Goal 2 analysis

Entry Skills
- Basic navigation on Salesforce.com
## Learner Analysis

*Table 2: Learner Analysis*

<table>
<thead>
<tr>
<th>Information Categories</th>
<th>Data Source</th>
<th>Learner Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entry Skills</td>
<td>Observations and Questionnaires</td>
<td>Learners have good knowledge of using sheets and websites. They are also at intermediate levels with their data analysis skills which is required for sourcing ideal leads and managing client data on Salesforce.</td>
</tr>
<tr>
<td>Prior knowledge of topic area</td>
<td>Questionnaire</td>
<td>All the sales reps have varying levels of experience in sourcing leads. A few users have seen the Salesforce platform but none of them have used it in real time.</td>
</tr>
<tr>
<td>Attitude towards content</td>
<td>Manager interviews and questionnaire</td>
<td>The target group is aware of the benefits of identifying ideal leads, and using Salesforce.com to log and manage their sales. They have faced problems with traditional logging of their data and are looking forward to learning Salesforce.com</td>
</tr>
<tr>
<td>Attitude towards potential delivery system</td>
<td>Questionnaire</td>
<td>Learners have exposure to both classroom and online training and are open to a blended methodology. They are particularly happy that they can revisit the online SF training lessons whenever they want to while working on the platform.</td>
</tr>
<tr>
<td>Motivation for Instruction</td>
<td>Questionnaire and Personal Interviews</td>
<td>The learners are motivated about both parts of the training. Firstly, they know that identifying ideal leads will enable them to close more leads and meet their monthly targets. Secondly, instruction on salesforce.com will enable them to log their data on an error-free platform.</td>
</tr>
<tr>
<td>Educational and ability levels</td>
<td>Questionnaire</td>
<td>All the sales staff are high school graduates and some of them have undergraduate degrees.</td>
</tr>
</tbody>
</table>
| General Learning practices                     | Questionnaire                                    | The target group has a good exposure to blended training and is capable of learning
in both synchronous and asynchronous environments.

<table>
<thead>
<tr>
<th>Attitudes towards training organization</th>
<th>Questionnaire</th>
<th>The target learners always look upon to their training team and have a positive opinion about the offered training programs.</th>
</tr>
</thead>
<tbody>
<tr>
<td>General group characteristics</td>
<td>Interviews and observation</td>
<td>A large portion of the team consists of young sales men between 22 to 30 years of age. There are a few female team members within the same age group. They come from various cultural backgrounds, so the instruction needs to be clear and precise with a good number of examples and practice exercises.</td>
</tr>
</tbody>
</table>

Performance Context Analysis

The performance context analysis was conducted by the instructional designer through appropriate interviews and more importantly through observations during site visits. The ID gathered information about how the sales reps determined the quality of the leads, and about where and how the sales persons would be using the platform to manage their client accounts. The ID then listed out all the factors that could facilitate the leaners’ use and practice of the new skills.

Table 3: Performance context analysis

<table>
<thead>
<tr>
<th>Information Categories</th>
<th>Data Sources</th>
<th>Performance Site Characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managerial/Supervisory support</td>
<td>Interviews and Observations</td>
<td>Hands-on support and guidance will be provided by the supervisors. Due recognition and Pat On the Back (POB) awards would be given to the sales persons who reaches his sales target and uses the tool appropriately without any errors.</td>
</tr>
<tr>
<td>Physical aspects of the site</td>
<td>Observations</td>
<td>Facilities: The learners will be getting their work laptops for practice to the classroom. Post training they will be using the same applications installed on their laptops to work on real-time data. Resources: Online training links will be provided for reference to the learners after the classroom.</td>
</tr>
<tr>
<td>Social aspects of the site</td>
<td>Interviews and Observations</td>
<td>Supervision: Supervision and guidance will be provided continuously till the learners accomplish their goals. Interaction: The training team will be interacting and taking feedback from the learners through email and questionnaires.</td>
</tr>
<tr>
<td>Relevance of skills to workplace</td>
<td>Interviews and Observations</td>
<td>Meet identified needs: Identifying leads that match the ideal customer profile will help the sales reps close more sales. Using SalesForce.com will ensure that the learners will have access to more organized data and thereby increase their productivity. Current applications: MS-EXCEL Future applications: Salesforce.com</td>
</tr>
</tbody>
</table>
## Table 4: Learning context analysis

<table>
<thead>
<tr>
<th>Information categories</th>
<th>Data sources</th>
<th>Learning site characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number/nature of sites</td>
<td>Observations, manager interviews</td>
<td>Number: One conference room in the same facility Facilities: A classroom will be needed for the first part of the training. For the second part, the learners can access the online training from anywhere on their work laptops or smart phones/devices through the learning management system. Equipment: Laptops and a regular classroom setting Constraints: The conference room needs to be blocked, and IT support is needed to install software and create user profiles for the learners on the first day of the training.</td>
</tr>
<tr>
<td>Site compatibility with instructional needs</td>
<td>Observations</td>
<td>Instructional strategies: A blended approach will be used for this training. The first part of the training will be covered in the classroom, while the second part will be covered through a short classroom session followed by online modules. The learners will access their online training lessons through their LMS. The learners will also receive handouts with instructions for logging in and maintaining their security settings. Delivery Approaches: The classroom will be equipped with necessary resources such as a projector, notebooks, pens, handouts etc. Time: The classroom training will be a 4-hour program which will include a lecture on identifying ideal customer profiles followed by a short session on setting up the SF tool on the learner’s laptops. After that, there will be an online module which will cover all the necessary functionalities of SF required for an end user in a sales role. Personnel: One lead instructor, a lab assistant, and an IT support executive will gear the classroom training.</td>
</tr>
<tr>
<td>Site compatibility with learner needs</td>
<td>Observations</td>
<td>Location: The conference training room is in the same facility where the employees work. Conveniences: Lunch will be served after the training. Coffee and snacks will be provided too. Space: The classroom can easily accommodate 50 learners.</td>
</tr>
<tr>
<td>Feasibility for simulating work place</td>
<td>Observations</td>
<td>Supervisory Characteristics: The supervisor will provide leads to the learners on how to take the program and implement it real-time. Physical Characteristics: The same laptop will be used for training and work. Social Characteristics: The learners will have a group exercise in the classroom, and the trainers will help them to interact and learn from each other on salesforce chatter (Social forum for communication).</td>
</tr>
</tbody>
</table>
Performance Objectives

**Goal 1: Source the right types of leads by matching them with the ideal customer profile**

After the training, given a set of leads as case studies, the learners will be able to identify the best leads that match the ideal customer profile.

**Goal 2: Use the Sales Cloud efficiently to manage their leads and opportunities**

Given access to Salesforce.com, the learner will be able to:

1. Locate and update their user profiles
2. Create an account
3. Create a contact and relate it to the account created
4. Create an opportunity related to this contact’s account

Assessment Instruments

**Pretest**

**Goal 1:** An open-ended questionnaire (Appendix A) will be given to the participants with practical questions on how they filter leads. This will provide an idea of the current strategies they are using to distinguish bad leads from prospective ones.

**Goal 2:** There will be no pretest for this goal.

**Posttest**

Both the goals will have a corresponding evaluation at the end of the training. Table 5 contains the format of the post tests.

*Table 5: Posttest format*

<table>
<thead>
<tr>
<th>Skill</th>
<th>Objective</th>
<th>Test Item</th>
</tr>
</thead>
</table>
| Source the right types of leads by matching them with the ideal customer profile | After the training, given a set of leads as case studies, the learners will be able to identify the best leads that match the ideal customer profile. | Test 1: 5 objective type questions (Appendix B)  
Test 2: A dummy ICP will be given to the participants along with a few leads and their profiles. The learners will study them in groups and identify the ideal leads. (Appendix D) |
| Use the Sales Cloud efficiently to manage their leads and opportunities | Given access to Salesforce.com, the learner will be able to:  
1. Locate and update their user profiles  
2. Create an account  
3. Create a contact and relate it to the account created  
4. Create an opportunity related to this contact’s account | Test: Simulation tests (Appendix C) on  
1. Locate and update your user profile.  
2. Create an account and relate it to the parent account.  
3. Create a contact.  
4. Create an opportunity related to the above contact’s account. |
Instructional Strategy
The instructional strategy will be to provide the following:

Goal 1:
1. The importance of sourcing the right types of leads.
2. Introduction to the ideal customer profile.
3. Tips for collecting the components required for matching the ideal customer profile with that of the client.

Goal 2:
1. Introduction to the interface.
2. Creating and updating profile information.
3. Creating, editing, cloning, and deleting accounts
4. Creating, editing, cloning, and deleting contacts/opportunities.

Objective Sequence and clusters
Pre-instructional activities
Motivation
The instructor will talk to the learners about the importance of filtering the leads and how to determine if they are ideal to be considered as prospects to start with the sales process. He will draw analogies on how gold is mined and ask questions to the learners to deduce the objective.

Secondly, the instructor will ask the learners of how they log their leads and maintain their client accounts. He will also encourage them to talk about the problems they are facing with this manual entry. He will then tell them that they will not have to deal with these once they familiarize themselves with Salesforce and start using it after the training. He will provide them support and handholding required to master the tool.

Objectives
The instructor will explain the objectives of the program in simple words and address any questions that the learners might have. He will also ask them if the objectives of the program meet their expectations or if there is anything else that they would want the training to address.

Entry Skills
The instructor will explain to the participants how cold calling and proper telephone etiquette is important while collecting a database of leads prior to filtering them. He will also ask them about how comfortable they are at using online tools. The instructor will make sure that everyone in the class agrees that they are comfortable with the entry skills or will work on improving them which will be critical for the success of this program.

Student Groupings
The students will work in groups for the activity in the first part of the classroom training. For the second part of the online training, they will need to work individually on their laptops.

Presentation Activities
The instructor will use a PowerPoint presentation to lecture the learners on how to identify ideal leads. He will use case studies to explain the various points. He will provide a hand out with a check list that can be used by the participants while they are filtering leads in real time.

The instructor will use a projector to show the participants how the Salesforce interface looks. He will provide them the basics on its navigation. He will also provide handouts with tutorials on how to perform the defined tasks.

Participation
Participation during the training is highly essential to understand and apply the process involved in filtering the leads. The learners will solve a case study along with the instructor to understand all the practical aspects of this skill. Similarly,
the participants need to install and try the user interface on SF to make sure that it is set up for the second part of their online training.

Assessment

The program will have 1 Pretest and 2 Posttests to assess the learner’s comprehension. For the first part of the program, a basic multiple choice pretest will be conducted to check the current strategy of the learners to filter leads. After the program, the learners will need to solve a case study and identify the best lead with reasons.

For the second part, the learners will take an online simulation test to assess their skills on:

1. Locating and updating user profile
2. Creating an account and relating it to the parent account
3. Creating a contact
4. Creating an opportunity related to the above contact’s account

Follow through activities

Memory aids in the form of check lists and Ideal Customer Profile sheets will be provided to the learners. Handouts for practice post the online training will also be provided to the learners. Post training, the instructor will be available through email for any further questions. The success of the program will be evident after a month through the display of the skills in their real work.

A short follow-up session will be planned after a quarter to check on the progress of the participants and to address any concerns that they might have.

Instructional Materials

Goal 1

The instructor will use a PowerPoint presentation to deliver the lecture through a projector. Copies of Ideal Customer Profiles and case studies will be given as handouts to the participants while the class is in progress. The pretest will be pen and paper test that will be provided to the learners prior to the training. Table 6 contains a part of the script for the Instructor led training.

Table 6: Instructor-led trainer guide

<table>
<thead>
<tr>
<th>Title</th>
<th>Trainer Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Welcome to the session on Identifying Leads using Ideal Customer Profile.</td>
</tr>
<tr>
<td>The Challenges of Prospecting</td>
<td>For many sellers, identifying an adequate number of new opportunities is one of the most significant sales challenges. Sure, our territory holds tremendous potential and our product portfolio represents a broad range of opportunities to impact our customers’ success. But, matching the right customer to the right solution can be an overwhelming challenge. As a result, many of us struggle to secure meaningful appointments with decision makers and regularly find our pipeline short of the needed volume of opportunities, costing us both time and money. The reason even the most effective sellers often struggle with prospecting is that they rely too heavily on outdated techniques, such as calling “C-Level” executives before understanding what value they can bring the customer. They waste time and effort fighting to “get around” gatekeepers who could actually help them be more effective. And, all too often they rely on “general benefit statements” that simply aren’t compelling to today’s busy decision makers.</td>
</tr>
</tbody>
</table>
| The Science of Prospecting | If you’ve ever found yourself among the many who struggle with these issues, this module on prospecting will prove immensely valuable. In this training:  
We’ll develop an ideal customer profile and then use this tool to better understand which clients may benefit from our solutions.  
Next, we’ll use this profile to gather valuable information about prospective customers and to identify specific opportunities to impact their success.  
Finally, we’ll leverage the information we gathered to secure meaningful appointments with decision makers who care about the problems our solution can address.  
So let’s get started ... |
**Introduction**

Long before any how-to-sell book was written, the term "prospecting" was used to describe the search for something valuable. That’s certainly what we’re doing as sales professionals when we develop opportunities. It’s helpful, then, to take a step back and consider prospecting from another angle.

Let’s suppose for a moment that we’re prospecting for gold rather than prospecting for sales opportunities. Before we could begin prospecting for gold, what would we need to know?

- We’d need to know what gold looks like. We could waste a lot of time on something that looks like gold but is not.
- Next, we’d need to know where is gold likely to be. Just because we know what it looks like, we probably would not dig up our front yard looking for it.
- And finally, once we know where the gold is, we need permission to dig it up. We must secure the rights to remove the gold from the landowner before investing any resources attempting to extract. If they won’t give us permission, there is no point in planning the extraction.

It’s no different with sales today.

**3-Part Process**

Developing sales opportunities, like prospecting for gold, involves the same three steps:

- We need to know what we’re looking for – We don’t want to waste any time with a business that can’t or won’t buy from us. We need a clear picture of what a quality opportunity looks like. We call this an ideal customer profile.
- We need to know where these quality sales opportunities are likely to be. Just because we know what it looks like, we probably would not dig up our front yard looking for it.
- And we need permission to dig. Based on which businesses match the profile, we must be prepared to sell the idea of an appointment to explore if and how we can solve a prospective customer’s business problems.

These three steps make up the Science of Prospecting, and that’s what we’re going to cover today.

**Objectives**

Our objective for today’s session is to review the creation and application of the Ideal Customer Profile. To do that:

- We’ll learn step-by-step how to create an Ideal Customer Profile using a product from the ACME Corporation as an illustration.
- We’ll also briefly discuss how to use our completed profile in our prospecting efforts.

**Ideal Customer Defined**

Let’s begin by defining what an Ideal Customer Profile is. The Ideal Customer Profile definition has two parts. It includes characteristics that:

- Enable the prospective customer to buy and
- Drive the prospective customer to do so now.

Enabling characteristics include the standard qualifications, such as having the money and authority to buy. Depending on your territory, it can also include relevant information such as being out of contract or the types of products and services the customer typically uses. Good and important stuff to know.

However, all too often, we find ourselves with prospects who are fully able to purchase but have no compelling motivation to do so. And that’s the reason for the second part of the definition.

Driving characteristics are business problems that result in measurable negative impacts on the business and its operations.

The ideal customer for any given product or service is one that is both able to purchase the solution and compelled to do so because their business is experiencing problems that this solution can address.

In defining an ideal customer, it’s important that our profile address both of these characteristics. We want to find businesses that can buy from us and that have problems that would cause them to want to do so now.

**Ideal Customer Profile Worksheet**

We define our ideal customers with the help of the Ideal Customer Profile worksheet. You’ll need a copy of this worksheet so you can follow along as we develop an ideal customer profile for an ACME Corporation product.

Open the Ideal Customer Profile worksheet provided to you.

**Sample Solution**

To define the ideal customers for a particular solution, it’s critical that we understand the solution. After all, we can’t define the ideal customer for our solution if we’re not really sure what problems the product or service can solve.

For the purposes of this course, we’ll create an Ideal Customer Profile for ACME Corporation’s Mobile Worker App. Like the ACME Corporation itself, the Mobile Worker App is a broad, multi-purpose solution that can handle nearly anything companies with mobile workers might need.

**Mobile Worker App Capabilities**

The first step in developing an Ideal Customer Profile is to list the major capabilities of the product or service.

For ACME’s Mobile Worker App, the capabilities are:

- Mobile Time Manager
- Notifications
- GPS Tracking
- And real-time job data

**Focus on One Capability**

Since different customers could use this product in different ways, it’s best to focus on one major capability at a time.
and build a profile for it. With this approach, we think more broadly and more creatively about how to use the product. We think outside the traditional product application and, therefore, often find better ways to generate interest and create demand.

Ideally, we would create an ideal customer profile for each of the major capabilities and then combine all the profiles we’ve created. The result would be a complete picture of what we’re looking for along with all the questions we could ask to find the real opportunities.

When selecting the capabilities to address, target major capabilities that help differentiate us and have application to our territory. For our purposes, we’ll build an Ideal Customer Profile that focuses on the ACME Mobile Worker App’s Mobile Time Manager capability.

### What Does It Do?

The first question we want to ask about Mobile Worker App is:

What does this capability do?

To answer this question, we describe the capability as we would to a customer. In our description, it’s important to stay away from industry jargon and technical terms.

For our example, we’d answer this first question as follows.

Mobile Time Manager allows workers to clock in and out of shifts remotely, noting time and location when data is entered. It also directly connects with common payroll services, allowing for easy time tracking and accounting.

### Without It?

The next question we ask to develop our Ideal Customer Profile is:

How does a business operate without this capability?

The goal of this question is to help us focus on the customer’s business rather than our technology.

For this question, don’t focus on how bad life must be for the customer because they don’t have Mobile Time Manager. Instead, just describe how a business would likely operate without it.

**Mobile Worker App – Without It**

For our example, we’d answer this question as follows:

This is what happens today: Field employees must either travel to the home office to clock-in and out, or they must call in and have an administrative person manually clock them in. Home office personnel must manually track field employee hours, and they manually upload employee hours to the payroll system.

### Relevant Business Characteristics

Our next step in developing an Ideal Customer Profile is to list characteristics of a business that has or cares about the business problems we just defined.

To identify these characteristics, think about the problems we just described and visualize the types of businesses that would experience these problems – either because of who they are or what they do.

For example, one important characteristic a business must have if they are to benefit from Mobile Time Manager is a mobile workforce. Simple enough, right?

### Who Feels the Impact?

Great, we’re almost finished creating our Ideal Customer Profile. Our next question is:

Who in the organization would likely experience the negative PIERS impacts?

For this question, we want to identify everyone who would likely care about this issue, not just the decision maker! Everyone who experiences the negative PIERS impacts has valuable information that can help us in our prospecting efforts.

In our next prospecting step, we’ll determine which companies might fit the Ideal Customer Profile. The more people we identify here – regardless of their influence on the decision – the more likely we will be to find someone willing to talk with us.

### How to Identify Who Feels the Impact

So how do we identify who to talk to? To answer this question, we again refer back to the problems we identified earlier.

Think about the roles in an organization that either experience the problems we listed here or have responsibility to resolve these problems.

For example, if one problem area is reduced productivity of the service team, who would be responsible for service productivity? The Service Manager, of course, so we would add this role to our Ideal Customer Profile worksheet.

### What Do We Ask?

Now, we’re ready for the last step in developing our Ideal Customer Profile, which is to list the questions we would ask to assess an opportunity with respect to Mobile Time Manager.

To develop these questions, go back once again to the business characteristics and the problems we identified earlier. For each characteristic and problem, develop a question that helps determine if a prospective customer has the characteristic or if they are experiencing the problem. The goal is to have at least 5 or 6 specific questions.

We’ll use these questions in the next step of the Prospecting process when we determine the degree to which a business matches the Ideal Customer Profile we just created.

### Recap - Benefits

Terrific. We’ve completed the Ideal Customer Profile for the Mobile Time Manager, just one of the capabilities of ACME Corporation’s ACME Mobile Worker App.

With this profile, we have:

- A clear list of problems solved by Mobile Time Manager.
  - The problems are defined by the way a business operates without Mobile Time Manager and
the resulting negative PIERS impacts they experience.

- The characteristics of a business that has or cares about these problems.
- A list of target contacts who are likely to care about these problems.
- And questions we can ask these contacts to assess the opportunity for Mobile Time Manager at any given business.

Remember, the time and effort you put into creating ideal customer profiles helps you identify potential opportunities and ultimately improves your sales results.

Keep up the good work.

Goal 2:

The instructional material for the second part of the training will be an online video tutorial that the participants will access on their work laptops and smart phones through their LMS. Table 6 contains the first two sections of the story board of the training video.

<table>
<thead>
<tr>
<th>Page/Click Path</th>
<th>Audio Script Notes/Questions</th>
<th>Visual Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen Home page</td>
<td>Welcome to the help session on creating and managing accounts on Salesforce.com</td>
<td>Small Blue title: Salesforce.com Training Large White Title: Accounts</td>
</tr>
<tr>
<td></td>
<td>In this session, we’ll show you create your user profile, create and edit an account, and relate it to a parent account. We will also see how to take advantage of information other sellers have entered on the account to improve your win probability on this opportunity.</td>
<td>Use the Blue fade “tip” box: OBJECTIVES Create user profile Create and edit an account</td>
</tr>
<tr>
<td>Screen Home page</td>
<td>First you need to update your user profile so that anyone who looks for you can find all your information and activity log on your home page. To do that let’s click on the home tab. Next, click on your name at the top of the page and select “My Profile”</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Profile Edit page</td>
<td>Let us now edit and update your profile. Click on the “User Detail” located to the left of the page. Then click on the “Edit” button. Update your information. Enter details in the text fields provided for Title, Department, Contact Information, Mailing Address, Time Zone etc. Click save when you are done.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Screen home page &amp; Accounts page</td>
<td>Let’s go back to the home screen now and see how to create and edit an account. First click on the “accounts” tab. Click the “New” button. Name your account. Fill in the rest of the accounts field with dummy data. Click Save.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Accounts – Create page</td>
<td>Following the same steps, let’s create another dummy account. In the “Parent Account” field, search for the name of the first account you created and select it as parent account. Good job, you’ve created two accounts and established a parent-child hierarchy.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Accounts – Edit page</td>
<td>Next let’s edit the account you created. Click on the “Accounts” tab. Search for the account you want to edit. Change the contact information of the account. Please note you can change any other text field too. This is just an example. Click the “Save” button.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Accounts – Delete page</td>
<td>Next let’s delete child account you created. Please note you cannot delete the parent account because of its associated child accounts. Click on the “Accounts” tab. Search for the account you want to delete. Click on the “Delete” button on the top right corner of the screen Click the “Save” button.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
<tr>
<td>Accounts – Cloning page</td>
<td>Next let’s clone the parent account. Click on the “Accounts” tab. Search for the account you want to clone. Click on the “Clone” button on the top right corner of the screen Click the “Save” button. This cloned account can be used to enter details of a parallel sister company.</td>
<td>Show the relevant screen recording aligned with the voice over.</td>
</tr>
</tbody>
</table>

The next section covers entering the business gaps section of the application.

<table>
<thead>
<tr>
<th>Page/Click Path</th>
<th>Audio Script Notes/Questions</th>
<th>Visual Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Screen Home page</td>
<td>Let’s go back to the home screen.</td>
<td>Two Blue up-pointing arrows, one to Add and one to Pull</td>
</tr>
<tr>
<td>Page/Click Path</td>
<td>Audio Script Notes/Questions</td>
<td>Visual Customization</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>1. <strong>Click Add button</strong></td>
<td>Start by clicking the Add button.</td>
<td></td>
</tr>
<tr>
<td>2. <strong>Click Select an option - Evaluator</strong></td>
<td>Next, select an evaluator from the dropdown. Everything you enter about the customer’s Business State and Gaps must be associated with an evaluator. That’s the person who gave you the information or who provided the information in a news article or in the company’s quarterly reports. The list of evaluators’ auto-populates from the contacts entered up above, in the Evaluators &amp; Relationships section.</td>
<td></td>
</tr>
<tr>
<td>3. <strong>Select Christina Smith</strong></td>
<td>After you’ve selected the Evaluator, the next step is to specify the Area of the Business Foundation Wheel where the information applies. When we gather information on a prospective organization or opportunity, we want to learn about business issues that are affecting their PIERS areas. The best way to do that is by asking about any of the areas listed on the outer two rings of the Business Foundation Wheel.</td>
<td>Use Business Foundation Wheel graphic with two outer rings gold – see AP&amp;M seller sim Position over to upper left; don’t cover Description</td>
</tr>
<tr>
<td>4. <strong>Click and hold Select an option – Area to display the dropdown list options</strong></td>
<td>After you’ve selected the Evaluator, the next step is to specify the Area of the Business Foundation Wheel where the information applies. When we gather information on a prospective organization or opportunity, we want to learn about business issues that are affecting their PIERS areas. The best way to do that is by asking about any of the areas listed on the outer two rings of the Business Foundation Wheel.</td>
<td>Use Business Foundation Wheel graphic with two outer rings gold – see AP&amp;M seller sim Position over to upper left; don’t cover Description</td>
</tr>
<tr>
<td>5. <strong>Select Processes</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. <strong>Click in Description field</strong></td>
<td>Next, enter a description of what you learned. This is the information you learned by using the DIG questioning model and asking who, what, when, where, and how. When entering information it’s a good idea to include details so that you don’t forget information as the opportunity ages. If you have an electronic copy of the information you gathered, you can simply copy and paste from that document.</td>
<td></td>
</tr>
<tr>
<td>7. <strong>Type: Improve work order processes</strong></td>
<td>Next, enter a description of what you learned. This is the information you learned by using the DIG questioning model and asking who, what, when, where, and how. When entering information it’s a good idea to include details so that you don’t forget information as the opportunity ages. If you have an electronic copy of the information you gathered, you can simply copy and paste from that document.</td>
<td></td>
</tr>
<tr>
<td>8. <strong>Click in Impact field</strong></td>
<td>Next, choose the PIERS impacts for this business issue. You can specify more than one. Remember, businesses buy only when they believe the product or service they’re buying will positively impact their PIERS impacts. For example, “Why does Smith Properties want to improve the work order processes? What do you hope to accomplish?”</td>
<td>Use PIERS graphic from AP&amp;M seller sim Position in upper left</td>
</tr>
<tr>
<td>9. <strong>Select Image</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. <strong>Click again in Impact field</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. <strong>Select Productivity/Efficiency</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. <strong>Click in the Impact Description field</strong></td>
<td>Next, briefly describe the PIERS impacts.</td>
<td></td>
</tr>
<tr>
<td>13. <strong>Type: Turnaround time on tenants work orders</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. <strong>Click in Gap field</strong></td>
<td>Finally, enter what you know about the Gap on this business issue. Gap is the numerical difference between where the company is now and where they’d like to be. Smith Properties has a turnaround on tenant work orders of 2 days; they’d like to get that down to 5 hours or less. This would increase the maintenance crew productivity.</td>
<td></td>
</tr>
<tr>
<td>15. <strong>Type: Reduce from 2 days to &lt; 5 hours</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. <strong>Click Add button</strong></td>
<td>Start by clicking the Add button.</td>
<td></td>
</tr>
<tr>
<td>17. <strong>Click Select an option - Evaluator</strong></td>
<td>Next, select an evaluator from the dropdown. Everything you enter about the customer’s Business State and Gaps must be associated with an evaluator. That’s the person who gave you the information or who provided the information in a news article or in the company’s quarterly reports. The list of evaluators’ auto-populates from the contacts entered up above, in the Evaluators &amp; Relationships section.</td>
<td></td>
</tr>
<tr>
<td>18. <strong>Select Christina Smith</strong></td>
<td>After you’ve selected the Evaluator, the next step is to specify the Area of the Business Foundation Wheel where the information applies. When we gather information on a prospective organization or opportunity, we want to learn about business issues that are affecting their PIERS areas. The best way to do that is by asking about any of the areas listed on the outer two rings of the Business Foundation Wheel.</td>
<td>Use Business Foundation Wheel graphic with two outer rings gold – see AP&amp;M seller sim Position over to upper left; don’t cover Description</td>
</tr>
<tr>
<td>19. <strong>Click and hold Select an option – Area to display the dropdown list options</strong></td>
<td>After you’ve selected the Evaluator, the next step is to specify the Area of the Business Foundation Wheel where the information applies. When we gather information on a prospective organization or opportunity, we want to learn about business issues that are affecting their PIERS areas. The best way to do that is by asking about any of the areas listed on the outer two rings of the Business Foundation Wheel.</td>
<td>Use Business Foundation Wheel graphic with two outer rings gold – see AP&amp;M seller sim Position over to upper left; don’t cover Description</td>
</tr>
<tr>
<td>20. <strong>Select Processes</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. <strong>Click in Description field</strong></td>
<td>Next, enter a description of what you learned. This is the information you learned by using the DIG questioning model and asking who, what, when, where, and how. When entering information it’s a good idea to include details so that you don’t forget information as the opportunity ages. If you have an electronic copy of the information you gathered, you can simply copy and paste from that document.</td>
<td></td>
</tr>
<tr>
<td>22. <strong>Type: Improve work order processes</strong></td>
<td>Next, enter a description of what you learned. This is the information you learned by using the DIG questioning model and asking who, what, when, where, and how. When entering information it’s a good idea to include details so that you don’t forget information as the opportunity ages. If you have an electronic copy of the information you gathered, you can simply copy and paste from that document.</td>
<td></td>
</tr>
</tbody>
</table>
Formative evaluation

Small group Evaluation
For the small group evaluation, a group of 6 diverse participants will be chosen for goal 1:

2 Learners - Doing well with their sales.
2 Learners – Consistently not able to meet their sales targets.
2 Learners – Doing average with their numbers.
The same set of participants will be used for the goal 2 which has minimum prerequisites so the diversity would not be important.
After the group goes through the instruction, they will be asked to fill a questionnaire (Appendix E) to seek their feedback on the program.

Peer Evaluation
A questionnaire (Appendix F) was used by an instructional designer to provide feedback on the instructional strategy used in the program in the form of a one-to-one peer evaluation.

Summative evaluation
The summative evaluation for this program will be based on the Kirkpatrick’s model and will be done in four steps: Reaction, Learning, Performance and Results.

Reaction: Immediate reaction of the participants after the training will indicate the learner’s perception of the course. To do this the participants will fill a questionnaire (Appendix G) soon after the training.

Learning: The post-test will help assess the progress/achievements of individual learners. Though a post-test is more of an indication of each learner’s ability post training, on an overall level it is also indicative of the success of a program.

Performance: Data will be collected after a month of the program to see how the sales reps are improving their sales and using SF to maintain their client accounts. This will help us measure the level of motivation and confidence that the program provided to the learners to apply the learning in their real work.

Results (impacts): The program’s overall effectiveness will be measured after a quarter by comparing the sales figures with the previous two quarters. The number of missed client accounts because of errors in data management will also be measured. The results will be converted into monetary units by the management to determine the exact ROI (Return on Investment) of the training.
References

https://app.box.com/v/salesforcehandbook-5activities

https://app.box.com/v/salesforcehandbook-5activities

Hands on Salesforce training part 1 by Tim Murphy, https://www.youtube.com/watch?v=InjL1JqiKhw

Salesforce.com - Help and training section, https://na35.lightning.force.com/one/one.app

Kirkpatrick’s four levels of evaluation, https://en.wikiversity.org/wiki/Instructional_design/Introduction_to_Kirkpatrick%E2%80%99s_four_levels_of_evaluation

Kirkpatrick’s model of summative evaluation, https://openi.nlm.nih.gov/detailedresult.php?img=PMC2631188_jeehp-3-3-g003&req=4
Appendix A – Pretest for goal 1

Is it essential to deduce the business problem that our product could solve while taking to the lead?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

How do you ensure that you are talking to the right person in the organization who could make a decision on buying our product?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

How will you conclude that the client has enough budget to buy new solutions?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

What research do you usually do before calling a lead?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

What strategies do you use to collect information like productivity loss because of lack of automation?

__________________________________________________________________________________________________

__________________________________________________________________________________________________

__________________________________________________________________________________________________
Appendix B – Posttest for Goal 1

Question 1:
When properly completed, the Ideal Customer Profile Worksheet will provide us with which of the following? Select all that apply.

A. A clear description of a particular capability
B. A list of problems solved by a specific capability
C. All the customers who will benefit from our ability to deliver this capability.
D. Questions we can ask to determine if a given customer will benefit from the specific capability

Question 2:
A single Ideal Customer Profile Worksheet should be completed for which of the following? Select the best answer.

A. Only service characteristics
B. Features we have successfully sold in the past
C. Targeted, specific capabilities that we believe are differentiating and will have application within our territory
D. Every customer in our territory

Question 3:
When completing the Ideal Customer Profile, the product description should ________________
Select the best answer.

A. Include technical details about product operation in case we are asked about this by our prospects
B. Provide a description of the capability in layman’s terms
C. Include the benefits the product delivers to customers
D. Be as short as possible

Question 4:
When completing the section of the Ideal Customer Profile Worksheet that identifies who feels the pain of the business problems, we should _________?
Select the best answer.

A. Avoid IT contacts
B. Focus on technology buyers in the customer’s business
C. Make the list as long as possible
D. Identify the specific people who are responsible for business operations affected by problems this capability solves.

Question 5:
Once an Ideal Customer Profile Worksheet is complete, what’s the next step? Select the best answer.

A. Use the questions on the profile to begin gathering information about our customers to determine which of them may have problems addressed by this capability
B. Develop a sample BIO Worksheet for the targeted customers
C. Review with our team to see who has successfully used a similar Ideal Customer Profile and what experiences they have had
D. Contact business decision makers in our customer module to talk about the capability we described on the Ideal Customer Profile
Appendix C – Posttest for goal 2 – Simulation test with directions

Objective: Locate and update your user profile.

Directions:
1. On the "Home" tab, click your name at the top of the page and select "My Profile".
2. Click the "User Detail" link located to the left of the "Help for this Page" icon.
3. Click "Edit".
4. Update your position information (title, department, etc.), contact information, mailing address, and time zone.
5. Click "Save".

Objective: Create an account and relate it to a parent account.

Directions:
1. Click on the "Accounts" tab.
2. Click the "New" button.
3. Name your account after yourself. For example, Tom Jones' account will be named "Tom Jones' Training Account".
4. Fill in the rest of the account fields to improve the quality of your record.
5. Click "Save".
6. Create another account and in the "Parent Account" field search for the name of the first account you created and select it as the Parent Account.
7. Congratulations, you've created two accounts and established a parent-child hierarchy.

Objective: Create a contact and relate it to the training account you created.

Directions:
1. From the "Recent Items" section of the "Home" tab, click your newly created account.
2. Scroll down to the "Contacts" related list and click "New".
3. Select the record type of "Contact".
4. Notice the "Account Name" is already filled in because you created the contact THROUGH the account.
5. Name your contact and fill in as many fields to improve the quality of your record.
6. Click "Save".

Objective: Create an opportunity related to this contact's account.

Directions:
1. From the "Recent Items" section of the "Home" tab, locate your contact.
2. Scroll down to the "Opportunities" related list and click "New".
3. Select the appropriate record type and click "Continue". Notice the contact's account name is automatically populated.
4. Name the opportunity using our standard naming convention (Account Name – Product – Year(s) of Contract)
5. Fill in the remaining fields to improve the quality of your record.
6. Click "Save".

Objective: Document the details related to this presentation by creating a new event under the contact.

Directions:
1. From the "Recent Items" section of the "Home" tab, locate the opportunity you created.
2. Scroll down to the "Open Activities" related list and click "New".
3. Select the record type of choice (if applicable).
4. Populate the remaining fields to improve the quality of your record. Notice the event is automatically assigned to you and automatically related to the opportunity.
5. Use the lookup icon on "field to associate the event to your contact.
6. Click "Save".

Objective: Open your "Monthly Activity Report" and "My Sales Dashboard"

Directions:
1. Go to the "Home" tab and click "My Monthly Activity" in the top left corner. Alternatively, you can access this report by clicking the "Reports" tab and searching for "Sales Activity Report - This Month".
2. Click "My Sales Dashboard" in the top left corner. Alternatively, you can access this dashboard by clicking the "Dashboards" tab and using the dropdown to select "My Sales Dashboard".
Appendix D

Ideal Customer Profile Worksheet

<table>
<thead>
<tr>
<th>Solution</th>
<th>Capability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile Worker App</td>
<td>Mobile Time Manager</td>
</tr>
</tbody>
</table>

What does this capability do?

Mobile Time Manager allows workers to clock in and out of shifts remotely, noting time and location when data is entered. It also directly connects with common payroll services, allowing for easy time tracking and accounting.

How does a business or its people operate without this capability?

This is what happens today: Field employees must either travel to the home office to clock-in and out, or they must call in and have an administrative person manually clock them in. Home office personnel must manually track field employee hours, and they manually upload employee hours to the payroll system.

What are the negative PIERS impacts of operating in this way?

- The productivity of the mobile workers would be negatively impacted when they must travel to the home office simply to clock in and out.
- Manual interfaces with payroll by the back-office operations would lead to inefficiencies.
- The business might also incur higher payroll expenses due to inaccurate time reporting and the manual labor required to correct these errors.

What are the characteristics of a business that has or cares about these negative impacts?

- Companies that have hourly employees working in the field
  - HVAC companies
  - Construction companies
  - Landscaping companies
- Companies that have a designated job dispatcher
  - Delivery businesses
  - Transportation companies
  - Taxi or shuttle services
- Companies that work on-site
  - Engineering firms
  - Construction and construction-related companies
- Companies that employ service technicians or that make on-site service calls
  - HVAC companies
  - Pest control companies
  - Appliance repair companies

Who in the organization would likely experience the negative PIERS impacts?

- Dispatch Managers or Service Coordinators
- Payroll Managers, Back-Office Managers, and Billing Managers
- Managers of hourly people who work remotely
- CFO
What questions should we ask to determine the degree to which this organization has or cares about this problem?

- Do you have people who work outside the office? What do they do?
- What challenges do you have tracking and reporting time for your remote and mobile workers?
- How are you coordinating payroll and timekeeping for your mobile personnel?
- How much paid-time do mobile personnel spend driving back to the office simply to report time or other trip information?
- How frequently do you encounter errors associated with mobile worker reporting, and how are those errors resolved?
Appendix E – Group Evaluation Questionnaire

Directions: Please indicate your level of agreement with the statements in the questionnaire and answer the questions that follow.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The objectives of the program were clearly defined</td>
<td></td>
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</tr>
<tr>
<td>Participation and interaction were encouraged</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The content was organized and easy to follow</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The handouts were helpful and relevant</td>
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</tr>
<tr>
<td>I will be able to use the learned skills in my work</td>
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</tr>
<tr>
<td>The trainer was knowledgeable about the training topics</td>
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</tr>
<tr>
<td>All the defined training objectives were met during the training</td>
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</tr>
<tr>
<td>The time allotted for the program was apt</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Would you suggest this program for your colleagues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What did you like most about this training?
_______________________________________________________________________________________
_______________________________________________________________________________________

What aspects of this training need improvement?
_______________________________________________________________________________________
_______________________________________________________________________________________

How do you think that this training will change the way you work?
_______________________________________________________________________________________
_______________________________________________________________________________________

Any other comments.
_______________________________________________________________________________________
_______________________________________________________________________________________
Annexure F - Peer Review/Formative Evaluation

• Are the needs of the organization clear?

Yes. Without any background on this type of system, I believe the organization's need is pretty clear: their current sales staff is not able to generate and track good leads for their products, for a few reasons. It sounds as if they don't have enough quality information about possible leads and when they can identify leads, they are using an insufficient tool (Excel) to track them.

• Are the instructional goals clear and aligned with the needs?

Yes. Company Innovative Software Inc. has invested in a tool, salesforce.com, and they intend to train their sales staff to use this tool to generate and track leads more efficiently, in order to meet their internal sales lead goals.

• Are the learning objectives aligned with the instructional goals?

I think the second goal that involves tracking sales leads that have already been identified is very clear, and I think the skills analysis is detailed with steps that show exactly what the learner should be able to do. It would be easy to test that, which means the objectives are clear. The first one needs more detail. I see the box above this states “Examine the criteria and determine if the lead is ideal using the Ideal customer profile sheet” so this is probably enough to show that the learners are going to use those characteristics to identify good leads. You might still go a level further to state what exactly the learner is doing there. I think once you do that, you will have your learning objectives, and they will support your performance objectives (which are the same as the instructional goals here) well.

• Is it clear what learners will know coming into the program and what they should be able to do at the end?

I found it easy to understand the two goals. The second Skills Analysis diagram showed me exactly what the learner should be able to do. The first diagram is a bit harder for me as an outsider to understand, and I think it needs further subordinate skill steps. But that's probably because there are soft skills involved here, too, or skills where outside research or resources need to be used to identify the leads.

• Do you have a sense of the learners and context of the instruction?

Yes, this is very clear. I don't think this needs any work.

• Is the instructional strategy sensitive to the needs of the learners and context?

Yes, this seems to be very detailed and well planned. I liked that the sales people will have access to resources on their phones. The only thing that might be helpful is to have the learners work in small groups (instead of the group) on the case studies for the first half of the class, where they are identifying good leads. Since salespeople tend to be outgoing and outspoken, they may enjoy coming up with a strategy in a smaller group where they can really share their skills, and I think this might get
lost in a larger group. Each group could then present their case study to the rest of the class and the instructor.

• Are the assessments aligned with the learning objectives?

Yes. It might be a good idea to include a sample case study (from which they would choose good leads). You might already be planning that. I think the second skills are easier to test and they are very clear here.

• Are the assessments aligned with the needs of the organization but sensitive to the context of the training?

Yes. Since the learners will practice their knowledge with the case studies in class, making the test multiple choice is a good way to make sure they know the key points they need to begin using these new skills immediately. The Sales Cloud test is also appropriate because they will take it just after they learn how to use the Cloud to find and track their leads.

• Are the instructional materials aligned with the instructional strategy?

Yes. The slide content and trainer notes seem very comprehensive.

• Are the instructional materials tailored to the learners and context of learning?

Yes. The language is friendly and engaging, so I can see this being delivered in a very interesting way that will keep the learners engaged, especially if the case studies are included to break up the lecture/presentation. The video should help the learners understand and practice on several platforms, which directly translates to how they will be using this tool on the job.
Appendix G – Summative evaluation – Reaction feedback

Directions: Please indicate your level of agreement with the statements in the questionnaire and answer the questions that follow.

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I was well informed about the objectives of this training</td>
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<tr>
<td>The content is relevant to my job</td>
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<tr>
<td>The activities in the program were interesting and challenging</td>
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<tr>
<td>The difficulty level of the program was appropriate for me</td>
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<tr>
<td>The pace of the program was good for me</td>
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<tr>
<td>The instructor was well prepared and helpful</td>
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<tr>
<td>The environment and material provided to me was helpful to the purpose of training</td>
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<tr>
<td>The time allotted for the program was apt</td>
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<tr>
<td>I would suggest this program to my colleagues</td>
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</tbody>
</table>

Which parts of the program do you think will be most useful back at work?
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_______________________________________________________________________________
_______________________________________________________________________________

What aspects of this training need improvement?
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________

Any other comments.
_______________________________________________________________________________
_______________________________________________________________________________
_______________________________________________________________________________