

A TOOL for Engagement and Learning

Delivering an Interactive, Team-Based Learning Experience to 900 Sales Professionals in a Single Room

Training Challenges in a Global Organization

When we were tasked with rolling out a comprehensive new sales process and metrics to our entire sales force at our annual meeting, we had a key concern: Is it possible to effectively deliver an engaging, interactive learning experience to a room of 900 people?

As a global financial services organization, we know how difficult yet important it is to bring the entire sales force together to share best practices, build knowledge, and develop a sense of camaraderie and common culture. With so many busy people traveling to a single location, it's important to ensure that their time is not wasted – every session and activity must be meaningful and enhance personal and professional development.

We quickly realized that bringing a one-day, experiential learning program to a group this size was beyond the scope of our internal training organization. That's why we enlisted the help of our strategic partner Advantage Performance Group.



Much More Than a Digital Tool

To address the challenges of delivering sales training to 900 people at one time, Advantage partnered with BTS, experts in strategy execution and sales thought leadership, to design an interactive experience that combined sales leadership panel discussions and discovery-based learning activities. BTS Digital Solutions was enlisted to develop an integrated, tablet-based tool to drive learning at the table level.

In preparation for the full meeting, Advantage brought in strategic partner Root Inc. to help create a half-day preparatory session for 200 sales leaders. Using a customized, illustrated Root Map, sales managers explored data and trends driving evolution of the financial services marketplace, facts about their own company's place in that market, and the implementation of a new sales cadence to drive the achievement of strategic goals. The exercise allowed sales managers to explore the realities of the new marketplace and draw their own conclusions, promoting buy in and preparing sales managers to coach teams during the full meeting.

In the main session, panels of sales experts presented know-how sessions from the front of the room. Teams of three used the tablets to submit questions to the panel, contribute best practices and tactics in crowdsourcing exercises, respond to multiple-choice and true/false questions, analyze sales scenarios, develop and present solutions to table managers, and record and rate video presentations, all in a competitive, fast-paced environment. Table-level and large-group debriefs helped solidify the learning. Responses were aggregated and winners were announced at the end of the session.

“The training was different from what I expected. It was great to see the company investing in our development rather than just sharing facts and data.” – Program Attendee

Engagement for Every Learning Style

The program was a great success. Participants of all learning styles were thoroughly engaged and participated fully. Many reported that the day went by so quickly that they were surprised and disappointed when it was over. Everyone left the workshop with a concrete set of commitments and actions to discuss with their managers in order to implement the learning in the following weeks. In addition, sales managers received instructions and materials they could use to reproduce the Root Map experience with their teams back on the job in order to cascade the learning.

900 sales professionals
200 sales leaders
250 tablets
1 hotel ballroom