Project Title:
Onboarding and Ongoing Training Program for New Sales Role

Instructional Designer:
Amanda Douvier, Senior Instructional Designer

1. Introduction & Purpose

The goal of this needs analysis is to gather data and insights to inform the creation of a comprehensive onboarding and ongoing training program for a new sales role. This role is pivotal in managing a book of business of 60 clients and requires proficiency in consultation, upselling through consultative selling, organizational skills, conflict resolution, multitasking, project management, and several applications such as Salesforce, Outlook, multi-line phones, and call recording systems. The training program will ensure new hires acquire the necessary skills and competencies to perform effectively in this role from day one, while also providing ongoing training for continued growth and development.

2. Needs Analysis Methodology

Step 1: Interviews with Role Creators
The first step of the needs analysis involves interviewing the team members who created the sales role. These interviews will provide insights into the rationale behind the role's structure, the skillset needed, and specific expectations.

- **Interview Questions:**
    - What are the primary responsibilities of the new sales role?
    - What skills do you believe are crucial for success in this role?
    - How do you envision the role's impact on client retention and revenue generation?
    - Are there any specific client interaction expectations that should be considered in the training?
    - Which applications should the new hire be proficient in using, and how frequently will they use them?
    - How do you envision the career progression of someone in this role? Is there a need for ongoing training?
    - What does success look like for someone in this role?

Step 2: Job Shadowing Current Role Performers
Following interviews with the role creators, the next step involves job shadowing current employees who are already performing in the sales role. This allows for first-hand observation of how the role functions day-to-day and what is expected. During this phase, the following data points will be recorded:

- **Applications and Tools:**

    - Salesforce (used daily for client relationship management)
    - Outlook (daily email correspondence and scheduling)
    - Multi-line Phone System (used throughout the day for client calls)
    - Call Recording System (must read disclosures before recording, used for each client call)
- **Daily Structure:**
    - How do sales reps structure their day to balance client calls, follow-ups, and administrative tasks?
    - How often do they interact with their 60 clients (monthly business reviews)?
    - How do they track their progress and client engagement?
    - What project management systems or techniques do they use to keep track of their tasks and deadlines?
    - How do they manage ongoing learning and staying updated with new product offerings or system changes?
- **Client Conversations:**
    - What are the key topics discussed with clients during monthly business reviews?
    - How do they handle objections or issues raised by clients?
    - What strategies do they use to resolve conflicts or address customer concerns?
    - What are common client pain points that the sales rep addresses?
    - How do they identify upselling opportunities through consultative selling? What methods do they use to position additional services or products in a way that adds value for the client?

Step 3: Skill and Competency Mapping
Based on the data collected from interviews and job shadowing, a skills and competencies mapping will be created. This will identify the core competencies required for success in the role, broken down into:

- **Hard Skills:**
    - Salesforce proficiency (CRM and reporting)
    - Multiline phone system handling
    - Call recording systems and legal compliance (reading call disclosure)
    - Proficiency in Outlook (email, calendar, task management)
    - Project management (task tracking and client engagement)
- **Soft Skills:**
    - **Consultative Selling and Upselling:** Ability to assess client needs and recommend appropriate additional products or services, positioning upsells as solutions to their challenges
    - **Consultation:** Strong questioning techniques to uncover client needs and provide tailored solutions
    - Organizational skills: Managing time effectively to balance multiple tasks
    - Conflict resolution: Resolving client issues and maintaining positive relationships
    - Multitasking: Handling multiple clients and tasks simultaneously
    - Analytical skills: Analyzing client data and making recommendations based on insights

Step 4: Curriculum Development Recommendations
Based on the skills and competencies identified, the following curriculum will be recommended:

- **Onboarding Training (First 2 Weeks):**
    1. **Salesforce Basics:**
        - Introduction to Salesforce interface and navigation
        - How to log client interactions, track progress, and generate reports
        - Customization for individual client needs
    2. **Client Interaction Fundamentals:**
        - How to conduct business reviews (structure, key questions to ask, handling objections)
        - Role-playing client scenarios to practice consultation, conflict resolution, and upselling
        - Understanding client pain points and how to position relevant upsell opportunities during consultative selling
    3. **Applications Training:**
        - Outlook usage: email management, calendar organization, and task management
        - Multi-line phone systems: managing calls, voicemail, and client follow-ups
        - Call recording system: compliance with legal disclosures and best practices
    4. **Organizational Skills:**
        - Time management techniques for balancing client calls, internal meetings, and administrative duties
        - Setting priorities for client follow-ups, business reviews, and project management tasks
    5. **Introduction to Project Management:**
        - Basics of project management: setting goals, tracking deadlines, managing deliverables
        - Tools and resources for managing client tasks and communications
    6. **Upselling through Consultative Selling:**
        - How to identify client needs beyond their immediate requests
        - Techniques for positioning additional services or products as solutions to client pain points
        - Role-playing consultative sales conversations to practice upselling in a way that adds value for the client
- **Ongoing Training (Months 2-6):**
    1. **Advanced Salesforce Features:**
        - Advanced reporting techniques, client segmentation, and predictive analytics
        - Workflow automation and customizing dashboards
    2. **Conflict Resolution Deep Dive:**
        - Handling challenging client situations with confidence
        - Negotiation and de-escalation techniques
    3. **Multitasking and Prioritization:**
        - Best practices for managing a high volume of client interactions
        - Strategies for balancing administrative work with client-facing responsibilities
    4. **Monthly Business Reviews:**
        - Best practices for conducting impactful business reviews

- Understanding client data and presenting solutions in a way that drives value

5. **Ongoing Skill Development:**
    - Monthly workshops or webinars on new tools, sales techniques, and market trends
    - Peer coaching or mentorship to develop soft skills like consultation, upselling, and relationship-building

3. Conclusion

The needs analysis highlights that the new sales role requires a blend of technical skills (Salesforce, Outlook, phone systems, call recording) and soft skills (consultative selling, upselling, consultation, conflict resolution, multitasking). The onboarding training program will be designed to ensure that new hires develop a strong foundation in both areas while focusing on the tools and systems they will use daily. Ongoing training will support their continuous development, ensuring they remain effective in managing their client book and growing their skills over time.

By addressing both the hard and soft skill requirements, including consultative selling for upselling, the training program will set new sales hires up for success, driving both individual and team performance.