



## **Improving the Sales Training Program in the Mexican Notebook**

**Company “Cuadernos Estrella”**

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**December 2021**

This project was submitted in partial fulfillment of the requirements for the degree of Master of Arts in the Graduate Liberal Studies Program in the Graduate School of Duke University.

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## Abstract

The purpose of this research is to devise a new learning strategy to train the sales workforce of the Mexican notebook company “Cuadernos Estrella.” The goal of the Human Resources (HR) department of the company is to standardize the existing in-person sales training program and develop a novel online training for 2022. Therefore, this research presents an extensive literature exploration of capacity development, adult learning theory, performance-based learning models, sales training basics, and virtual and blended learning in order to devise an optimal learning strategy for the company. I conclude by providing a range of best practices and recommendations on sales training, as well as a roadmap with a work plan to develop a blended learning strategy for the sales training in 2022. Building primarily on the ADDIE (Analyze, Design, Develop, Implement and Evaluate) model, the roadmap includes actionable next steps for the HR department to enhance the existing sales program. Since the purpose of this research is merely theoretical, the roadmap focuses on the first two phases of the model: analysis and design. My research aims to inform the HR department on best practices for future training development and contribute to enhancing the overall sales operations of the company.

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## Acknowledgements

I thank Professor Lisa Moreau, who was my tireless companion in this journey. I will be forever grateful for learning with you and from you!

Special thanks to my colleagues in Cuadernos Estrella for allowing me to serve them and retribute all the time and investment they have spent on me. Also, special thanks to my grandfather, GFG, who led by example and left a permanent legacy in the company.

Lastly, but not less important, I am so grateful for having the support of my family and for having the opportunity to meet and share knowledge with marvelous people like my teachers and classmates of the Graduate Liberal Studies. This experience would have never been the same without you!

I almost forgot... My master's journey began thanks to my husband-to-be. I appreciate your love, patience, and support throughout this process.

# Introduction

This paper consists of four sections that could help inform the HR department of Cuadernos Estrella on best practices and recommendations based on my research findings from secondary sources. In the first section, I provide an overview of the company, state my motivation for conducting this research, and explain my role as a consultant. In the second section, I describe the research methodology, which focuses primarily on three of the seven steps by Huse & Cummings (1985): problem clarification, goals and objectives of the project, and data collection. In Chapter 3, I incorporate a set of tables, figures, and relevant information that explains how to build individual and organizational capacity within the sales workforce of the company. Chapter 3 includes relevant information on the “Andragogy for Practice” model to incorporate adult learning principles in the sales training strategy. This chapter concludes with guidance on the use of the ADDIE model and the “70-20-10” model to enhance the sales processes. Chapter 4 concludes with best practices and recommendations for the company. One of the main findings is that Cuadernos Estrella should consider implementing a blended learning strategy for the sales training, which consists of combining in-person and online learning approaches. Finally, I include a roadmap and a work plan that could help the company implement the blended learning strategy in the future.

# Chapter One: Context

## Background of the Organization

Cuadernos Estrella is the second-largest notebook manufacturer within the Mexican paper industry. It is a family business that has produced quality notebooks since 1948. Today, it manufactures around 340 different school and office products for more than 2,500 clients across the entire Mexican territory. The company is comprised of 342 employees—61 percent male and 39 percent female. It is divided in three large departments: the Sales Department (99 employees), the Administration Department (42 employees), and the Production Department (201 employees). Cuadernos Estrella is well known in the industry for having competitive compensation packages for its employees. (The retention rate last year was almost 99 percent.) Moreover, organizational values—like commitment and reciprocity—reflect the culture and philosophy with which the founders led by the example. As a result, more than 35 employees have been working for the company for more than 20 years.

As a family business, the decision-making process occurs at two levels: 1) at the Family Board, and 2) at the operational level. The Family Board consists of three members of the second generation of the owner family. There are two owner families: the Fianos and the Garcias. The founders of the company, Guillermo Fiano and Victor García, were two immigrants from Galicia that fled Spain due to the civil war. Upon their arrival in Mexico, Guillermo and Victor were hired by their extended family in a small notebook workshop in Mexico City. The extended family were also immigrants from Galicia and fled a few years before them. They started the business but sold it to Victor and Guillermo in 1982. Both families have been partners since then. Therefore, the participation of the family members in the decision-making process at the board is crucial (since the family members are the ones in charge of devising the general strategy for the legacy to continue). At the operational level, the decision-making



process is the responsibility of experts and business professionals—like the CEO and the CFO—who are not part of the owner family but operate the business on daily basis.

In 2019, Cuadernos Estrella reinvented itself by creating a novel organizational culture. A new administration took over, and the third generation of the owner family engaged in the company's operations. The innovation of the organizational culture built upon ethics and sustainability principles to reframe the mission and vision of the company. Today, the mission is to create products that preserve written experiences and knowledge for the upcoming generations. The vision of the company is to become the company with the greatest ethical and sustainable growth in the paper industry (Estrella, 2021). These modifications to the organizational culture arose from the genuine desire of the Family Board to be accountable for corporate responsibility. The major overhaul entails the adoption of a more sustainable supply chain. For instance, 85 percent of the raw material used in the company is bond paper, which is made of cellulose, which is extracted from trees. One step closer to sustainability was to find suppliers that incorporate afforestation practices and are certified by international governments. The possibility of achieving a complete eco-friendly supply chain has become a priority for me as a third-generation member of the owner family.

I was recently hired as a Human Resources Assistant for the HR department of the company. One of my activities in this role entailed acting as an instructional designer for the sales training program of the company. Given the harsh economic environment in the notebook industry (exacerbated by school shutdowns due to Covid-19), sales dropped around 13% in 2021. Therefore, the CEO of Cuadernos Estrella instructed that the training should be designed in-house (and no budget has been allocated for these purposes). As an instructional designer, and having attended the last in-person training, I discovered several flaws. For instance, I identified a lack of standards in the sales processes—since every

regional manager has developed their own training approach—which has resulted in evident variations in the performance of the sales agents.

The current sales workforce in Cuadernos Estrella consists of 99 employees—including the commercial director, regional managers, sales agents, and sales representatives. Given the national presence of Cuadernos Estrella in the Mexican territory, there is a large concentration of sales agents and representatives who work across distinct geographic locations. This factor—along with the Covid-19 pandemic—complicates the logistics of delivering a proper in-person training. Therefore, the Human Resources Department has been working on a novel online training program for sales—using the Google Classroom digital platform—which was launched as a pilot project in April 2021.

## Area of Interest

My Master's Project consists of devising a learning strategy for the sales training program. I have explored Fosales training trends that include blended learning (e.g., a combination of in-person and online learning components) to develop a roadmap for the HR Department of the company to improve the existing sales training program. The purpose of this research is to provide a set of recommendations and best practices that will result in effective learning for the sales agents—aiming to achieve a better sales performance in the future.

The existing training program contains too much information for such a short period (the in-person training typically lasts only one day). In addition, there is no emphasis on how to develop and practice effective sales skills and competencies. Because the training programs are delivered regionally, there is no consistent approach or common standard for training the sales staff, affecting the sales performance across regions. Therefore, I will leverage my Master's Project to explore sales training trends and issues

across different industries, core competencies and skills for sales agents, and blended learning approaches for training—a combination of in-person and online learning.

I explore two performance-based learning models, namely the “70-20-10” model—which refers to a combination of on-the-job learning, coaching, and formal training (C. J. Jos Arets, Vivian Heijnen,, 2016)—and the “Learning for Performance” (ADDIE) model—an instructional design intended to fix a performance problem or gap when workers lack the essential skills and knowledge for a specific job responsibility, competency, or task (IntraHealth International Inc, 2007). The added value of performance-based learning is that agents can develop a specific set of skills by using and applying knowledge (rather than only memorizing information) (Hollandsworth & Trujillo-Jenks, June 2020). Thus, my research will allow me to provide a set of best practices and recommendations for the company to implement in the future.

## Role of the Consultant

In January 2020, I started my Master of Arts in Liberal Studies at Duke University but continued working remotely for the company as a HR Assistant. In Fall 2020, I enrolled in the Capacity Development course at the Sanford School of Public Policy with Professor Lisa Moreau. I was already familiar with the practice of capacity development since I collaborated in a non-profit organization for many years—where I worked developing capacity at the individual level with volunteers. However, the knowledge I acquired at Duke on capacity development at the organizational and individual level became my best allies to create a learning strategy for the HR Department of the company to improve the existing sales training program. I wanted to better understand how organizational capacity could be developed through individual training. Similarly, I wanted to explore more about sales training trends and blended

learning to standardize the sales training efforts. This exploration allowed me to devise a learning strategy and ultimately provide a roadmap for the HR department to improve the existing sales training.

## Chapter Two: Methods

I explain the research process in this section. To elaborate on the process, I use the foundations of the Huse and Cummings (1985) Action Research Model. The model builds on seven steps, but for this section, I only focus on the first three: 1) Problem Clarification, 2) Goals and Objectives of the Project, and 3) Data Collection.

In the first section, I explain the ethical constraints faced during my research process regarding the IRB review and my position as a member of the owner family of the company. For my research, I conducted an extensive literature review—based on secondary sources—on sales and learning development to devise a new learning strategy for the sales training program of the company.

In the second section, I explain how the desk review on capacity development, sales training trends, and adult learning grounded my work as an instructional designer. Several theories and models helped me develop a set of recommendations and best practices for the HR department. The objective of the new learning strategy is to standardize the existing in-person sales training and create a work plan to develop a novel online training program for 2022. Finally, in the last section, I explain how I collected the data for the literature review.

### Problem Clarification

The focus of this research is purely theoretical. At the beginning of the project, I thought that an IRB review would not be required and that I would be able to conduct applied research. However, due to the nature of the project and the role I have in the company, applied research would have entailed ethical considerations. First, conducting interviews and surveys with my colleagues in the company is considered an "experiment with Human subjects." After completing the CITI (Collaborative Institutional

Training Initiative) training course, I realized that, due to my position as part of the owner family, there was a slight chance of committing "power and subordination" dynamics if I conducted interviews and surveys with the employees. The IRB Advisory recommended that I relied on a third party to conduct the interviews and surveys on my behalf to avoid power and subordination dynamics. Unfortunately, due to time and budget constraints, hiring a third party was not feasible. Thus, I decided to modify the scope of my research to a purely theoretical approach. The final deliverable will serve as a roadmap of best practices and recommendations for the HR department that aims to standardize the existing sales training through a blended learning approach (i.e., virtual and in-person).

## Goals and Objectives of Project

The purpose of this literature review and the Roadmap deliverable is to devise a new learning strategy for the Mexican notebook company Cuadernos Estrella. The findings and recommendations will serve as a proposal to enhance the existing sales training program in the future. One of the main objectives of the company (amid the Covid-19 pandemic) was to create a standardized, remote, and performance-based training program. However, according to my research findings, a blended learning approach using the ADDIE model (Analyze, Design, Develop, Implement, and Evaluate) would prove more adequate for the new learning strategy.

## Data Collection

The literature review consisted of several books, journal articles, electronic articles, and public information available through companies and practitioner working groups in the learning development and sales training spheres. For the Findings section, I dove into organizational and individual capacity with Jenny Pearson's compilation on capacity development for practitioners (2011). To explore andragogy principles of learning, I selected the sixth edition of "The Adult Learner," a classic book by

Malcolm Knowles, Holston, and Swanson (2005). For the performance-based learning models, I explored two models: The "70-20-10" Model and the ADDIE Model (and their application to sales training). For sales training specifically, I used the book "Sales Training Basics" by Angela Siegfried (2010) and consulted with Paula Robinson (the librarian from the Fuqua School of Business) for more journal articles related to sales training trends in the workplace. Similarly, I consulted several reports from the Association for Talent Development (ATD) about best practices for Human Development and Jane Hart's top tools for training to learn which tools are being used for virtual and blended learning in the workplace. Finally, Professor Moreau introduced me to the "Learning for Tech Toolkit," which is an instructional design example based on the ADDIE model. The toolkit became my reference when proposing the roadmap. The roadmap is presented in the appendix section with a work plan and next steps to be completed by the HR department.

To abide by the regulations regarding experimenting with Human subjects, the HR Department provided non-identifiable information about the learners. The data provided consisted of different PowerPoint presentations that contained non-identifiable data of the results of a generational analysis conducted in April 2021 and non-identifiable data related to a learning style analysis conducted in 2020. For my research, I used specific data from the PowerPoint presentations. Also, I created a list of contacts from the company, who are aware of the Master's Project and agreed to provide general information for the research process. The list consists of the CEO, the Sales General Manager, and the HR Manager. The data contained in the contact list is not personal but institutional to protect the identity of all contacts. In addition, I include a signed document of informed consent to validate that the information shared is authorized by the mentioned members of the company.





## Chapter Three: Findings

### Individual and Organizational Capacity Development

To have an overview of Capacity Development, I explore a summary of theories and practices developed by practitioners and theorist working groups in the learning and development field. First, I explain what capacity development is. Second, I define core concepts (levels, types, and themes) of Individual and Organizational Capacity Development. Third, I explore the meaning and definition of Capacity Management in the context of business and other related concepts like Human Capital and Human Development. The study of capacity and the practice of capacity development do not have a "one-size-fits-all" definition because they entail an ongoing and dynamic processes of change and transformation that occur at different levels, types, and themes (Pearson, 2011). However, practitioners and scholars have agreed that capacity development is about “change and transformation through designing and facilitating culturally appropriate local solutions to development issues at a large enough scale to make a real difference for human development.” (Pearson, 2011).

The starting point to develop capacity—at the organizational and individual levels—in Cuadernos Estrella is to have a common understanding of how the principles and values of capacity development work. For instance, capacity development actors (i.e., organizations, systems, or individuals) must convene on how to operate within similar frameworks (since capacity can be developed across different levels, and with different themes and types). Therefore, the challenge—and complexity—of this issue is to share the same understanding of the four principles in which capacity development operates. These principles are: 1) developing locally driven processes, 2) building existing capacities, 3) supporting demand-driven efforts, and 4) defining and measuring capacity results. If actors do not have a shared understanding of these principles and do not operate within similar frameworks, they are not

developing capacity within their organizations. For instance, if the HR department does not collect information about the existing know-how provided by the sale agents and promoters, the training will lack the expertise from “locals” (or the ones that know how to perform the activity). The HR department should design and measure the training capacity results in collaboration with the Sales department. In other words, both departments need to operate within the same framework using and applying the four principles to develop individual capacity.

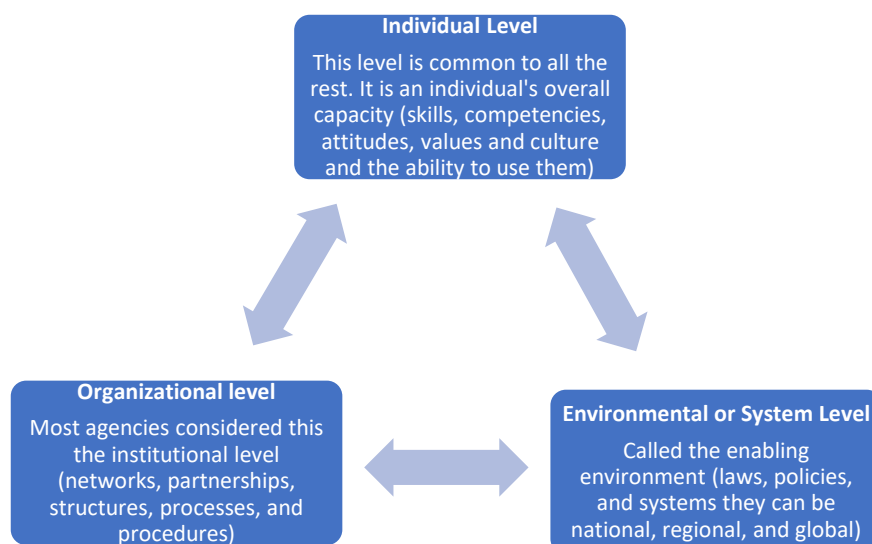
In my journey of individual capacity, the MALS program has amplified my knowledge to improve the projects I have managed during my time at my real-life job. For instance, I was able to improve and update the company’s Code of Ethics by applying Dr. Amy Hall’s teachings and encouraging cross-department conversations to identify misconducts and try to modify behaviors according to the new values that we stand for as an organization: compromise, integrity, reciprocity, and excellence. With the tools acquired from my Storytelling course with Professor Catherine Admay, I contributed to producing an “edutainment” video to reinforce the history and values of the company in the induction process as part of the cultural organization curricula. The video had a positive effect on the company’s internal communications and promotion of the company’s organizational values. In my Migrations course with Professor Charles Thompson, I learned how inclusion reduces the probability of encouraging power and subordination dynamics, especially when all the sides of the stories—or all the voices—are included in the design and creation of content. For this research, I focus on the study and practice of Capacity Development at the individual and organizational levels.

## Levels of Capacity Development

Capacity Development occurs at different levels; each actor defines the adequate level according to their specific context and development objectives (see Figure 1). The most common specifications of

capacity occur at the individual, organizational, and environmental levels. However, it is important to underscore that capacity does not work at one level only; it intertwines between levels as part of a whole system (Pearson, 2011). Thinking about developing capacity in the context of Cuadernos Estrella, I focus on the individual level (the key link between the organizational and environmental levels since it is common to both). Capacity for individuals is the ability to use skills, competencies, and attitudes to achieve an objective (Pearson, 2011). In the case of the company, the goal of the HR department is to develop hard and soft skills within the salesforce through training. While relevant soft skills include negotiation, client service, and change adaptability, important hard skills include product knowledge, prospection, and the standardization of marketing execution in specific sales points. Therefore, the sales training program could be a form of developing individual capacity within the sales workforce.

**Figure 1. Levels of Capacity Development**



Source: Pearson (2011).

## Capacity Development Types

Depending on the specific context of the actors, different types of capacities are needed for diverse reasons and measures (Pearson, 2011). Usually, capacity is a mix of hard and soft skills that can help individuals, organizations, and systems achieve their development objectives (see Table 1). The process of examining both types of capacities—hard and soft—could help the HR Department establish which competencies are required within the sales workforce to achieve the company’s sales training objectives.

**Table 1. Hard and Soft Capacities**

Hard Capacities	Soft Capacities
<p><b>Technical</b> Explicit knowledge, methodologies, technical skills</p> <p><b>Functional</b> Organizational capacity to function: structures, systems, procedures, planning, finance, HR department, mobilize resources (management), laws, policies, strategies</p> <p><b>Tangible/Visible</b> Infrastructure, money, equipment, documents the material expression of “Product of capacity” but are not capacity themselves</p>	<p>Soft capacities are social, relational, intangible, and invisible</p> <p><b>Operational</b> Organizational culture and values; leadership; relational skills: negotiation, teamwork, conflict resolution, facilitation, problem solving, intercultural communication</p> <p><b>Adaptative</b> Ability and willingness to self-reflect; ability to analyze and adapt; change management</p>

Source: Pearson (2011).

## Capacity Development Themes

Capacity development connects the knowledge and experience at a national, regional, or global level within related disciplines and communities (Pearson, 2011). The themes of application in capacity development are defined by two aspects: 1) the areas in which **capacity is needed**, and 2) the **drivers of**

**change** for developing capacity. The use of the themes of application varies depending on the actor because it depends on what is best according to its circumstances. In the case of Cuadernos Estrella, both aspects are relevant. Thinking about areas of opportunity for capacity development in the company, the HR department should develop new training strategies for its employees. (In this report, I explore a blended learning approach.) As for the drivers of change, the novel training strategies must adapt to the evolving conditions of the Covid-19 pandemic—which reinforces the notion that the HR Department should explore new training approaches (e.g., through in-person and online instruction).

In the business sector, the definition of capacity relates to ensuring the maximization of resources while minimizing costs. Capacity is measured on “how much companies can achieve, produce or sell in a given time” (Cambridge Dictionary, 2021). Capacity in business is called capacity management—which is also related to change and how fast industries or companies adapt to change. Examples of changing conditions in businesses are seasonal demand, macroeconomic events, and unexpected industry changes. However, capacity management can happen at three levels within the organization: 1) business level, 2) service level, and 3) component level. The business-level capacity is about the business capabilities of teams and processes; for instance, human resources, infrastructure, or technology (Spacey, 2017).

For this research, I am interested in how the business level could relate to developing capacity at the individual level through business capabilities. In the understanding that capacity development aims to improve the lives of people, workplaces are ideal spaces to this end. The acquisition of new skills and knowledge allows people to perform better in their jobs while also having personal growth. In line with the company’s value of reciprocity, it is the responsibility of Cuadernos Estrella to provide employees with better compensation packages to improve their life quality. But it is also crucial that the company

offers training to encourage personal growth among employees. In his book “Human Capital,” Gary Becker (1964) examined the role of training and education concerning the increase of skills and knowledge within workers (Gary S. Becker, 1964). Becker implied that workers with different skills had different levels of productivity. Therefore, workers should have different earning rates or compensations according to their skill level (Margaret M. Blair, 2011).

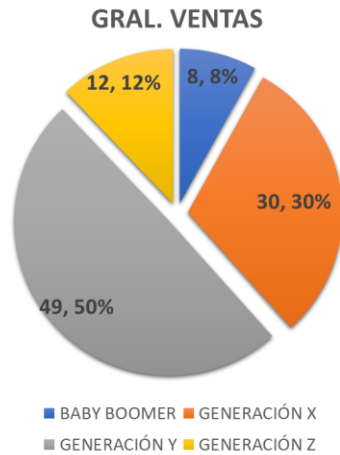
The Human Capital theory has been controversial, and there have been ongoing debates around this conversation for decades. In her research, Margaret Blair mentions three strong critiques from experts in diverse fields. First, experts critique the use of the term “Human Capital” by highlighting that people are not assets. The second critique highlights how cultural aspects related to education are perceived by social scientists as “consumption goods” rather than investment. Third, experts critique the misuse of the concept in models explaining economic growth (Margaret M. Blair, 2011). For my insights, I found this theory to be the beginning of a difficult conversation that reshapes how businesses perceive “investment” in Human Capital at the workplace. This theory not only reshapes the way companies compensate their workforce but also paves the way for training and education as important factors in Human Resources management.

The concept of “Human Development” was also useful to complement the set of ideas around improving the lives of people in the workplace. This approach was first introduced in the 90's by the United Nations Development Programme UNDP through a report that aimed “to expand the richness of human life, rather than simply the richness of the economy in which human beings live” (UNDP, 2021). Human Development focuses on three factors: people, opportunities, and choice. Human Development is about people and means that income growth is a means to development rather than an end. In other words, the “lives of people lead rather than assuming that economic growth will lead” (UNDP, 2021).

Opportunities are based on giving people the freedom to live lives they value (UNDP, 2021). This factor is where developing capacity at the individual level and opportunity intersect. The workplace should be a space where—if the right conditions are created for human development occur—people should be able to develop abilities and have the opportunity to use them. Similarly, "choice" is related to providing opportunities but not forcing people to use them. Human development is about creating an environment for people to develop their full potential and lead productive and creative lives (UNDP, 2021). These concepts broadened my perspective on how organizations understand the value of training and development in their fields and how powerful these human-centered approaches could be if properly implemented in businesses.

For HR to develop capacity at an individual and organizational level, they must first know the characteristics of their audience of learners by designing a learner profile. According to a generational analysis provided by the HR Department of Cuadernos Estrella, 49.5% of the salespersons in the company were born between 1980 and 1994. This means that most of the salespersons belong to "Generation Y" (better known as "Millennials"). In addition, according to the age variation, all the salespersons are adult learners (see figure 2). Therefore, for the learning strategy roadmap, I explore adult learning (or andragogy) as the adequate learning approach.

**Figure 2. Generational Analysis of the Salespersons of the Company**



Source: Cuadernos Estrella (2021)

## Adult Learning Principles and Models

In 1970, Malcolm S. Knowles introduced a groundbreaking idea in his book *The Adult Learner*. He proposed that adults and children learn differently. This novel idea was presented in the United States and sparked an ongoing academic conversation about adult learning or andragogy. *The Adult Learner* is a classic and a core work on andragogy that has been present for scholars and practitioners for over thirty years. In his sixth edition, Elwood F. Holton III and Richard A. Swanson complemented Knowles's theory on adult learning with good practices for HR Development and a model of "Andragogy in Practice." For this chapter, I explore the core principles of adult learning or andragogy, adult learning as a practice within HR development, and the model of andragogy in practice.

"Theory" and "learning" are two root concepts that need to be highlighted to understand where the term Andragogy comes from. Learning theory has proven beneficial for managers, experts, and consultants to inform better decisions when developing learning experiences in an organization. To explore learning theory, one must first be familiar with the ongoing academic conversation around the



definitions of "theory," what the differences between learning and education are, and the reasons why it is so complex to define learning (M. Knowles, Holton, & Swanson, 2005).

First, learning theorists define "theory" as a set of assumptions, generalizations, and hypotheses; on the other hand, psychologists like Skinner object that theories cannot explain learning (Skinner, 1954).

However, many authors have acknowledged the importance of learning theory and created their definitions. For Swanson and Holton, a theory is a "comprehensive, coherent, and internally consistent system of ideas about a set of phenomena" (M. Knowles et al., 2005, p. 16). Several authors acknowledge the differences between learning and education by explaining that education is mostly about the experience of the educator (teacher), while learning is about the person "in whom the change occurs or is expected to occur (learner)" (Boyd & Apps, 1980). In the context of Cuadernos Estrella, highlighting the purpose of learning is imperative since training programs in the past have primarily focused on the instructor's needs and experiences first, and then on the learners' experiences. Thus, this situation limited the opportunities of the instructors to get to know better who the learners were and what they needed to learn to perform better.

Holton and Swanson defined learning as "the process of gaining knowledge and expertise" (M. Knowles et al., 2005, p. 17). In the case of Cuadernos Estrella, the workplace should be a place where people experience learning. In this sense, the company has a responsibility to create the conditions for the workforce to gain knowledge and expertise through different strategies like training. The ATD (Association for Talent Development) 2020 whitepaper revealed relevant data regarding organizations that provide specific skills and strategic training for sales. The training has two components: 1) skill training and 2) strategic training. Skill training is about the art of selling, interpersonal skills (emotional intelligence), and leadership skills. Strategic training is about "processes, methodologies, and systems"

(ATD, 2021 p. 4). The paper found that 60 percent of organizations provided quarterly skill training and 51 percent strategic training (these figures increased by seventeen and twelve percent, respectively, compared to 2018 figures). This means that organizations are prioritizing the development of these skills and are allowing their salespersons to improve in these areas (ATD, 2021 p. 4). However, the idea that people can achieve great goals if given the opportunity (by having initiative and then being rewarded) comes from Behaviorism, the all-American philosophy of Watson and Skinner back in the '60s (Skinner, 1968).

According to Holton and Swanson, there are two main approaches for the study of adult learning: the scientific and the artistic. The scientific approach—proposed by Thorndike—uses “rigid investigation to discover new information” (Thorndike, 1928). The artistic one—initiated by Lindeman—uses intuition and experience analysis to discover new information (Lindeman, 1926). Lindeman was the pioneer in the identification of key assumptions about adult learners. The three assumptions are 1) adults are motivated to learn when they experience the need and interest that learning will satisfy; 2) adults’ orientation to learn is life-centered, and experience is the richest resource; and 3) adults have a deep need to be self-directed and individual differences among people increase with age (M. Knowles et al., 2005, p. 40) After Lindeman’s publication in 1926, the interest in the key assumptions arose, and other scholars began to write related articles that were published in the *Journal of Adult Education*. In the '40s, most elements related to adult learning were discovered; in the '50s, the social science disciplines (clinical psychology, sociology, philosophy) began thorough research on the topic. However, since 1970, journal articles have reported the application of andragogic frameworks in fields such as social work education, **management training**, and graduate education (M. Knowles et al., 2005, p. 71).

An integrative framework regarding adult learning began as early as 1949 with the publication "*The Mature Mind*" by Harry Overstreet, followed by Knowles's publication "Informal Adult Education" in 1950 (M. Knowles et al., 2005, pp. 58-61). The Theory of Adult Learning, or Andragogy, flourished after World War I, and a significant body of assumptions about the characteristics of adult learners emerged. (However, efforts to formulate a theory that considered research and experience had been going on for more than five decades.) Knowles's early attempt to formulate a theory was organized around the assumptions that adults learn better in informal, flexible, non-threatening settings (Knowles, 1950). But it was not until the '60s, during a workshop in Boston, that Dusan Savicevic, a Yugoslavian adult educator, first introduced the concept of andragogy as "the art and science of helping adults learn." Although the term was coined in 1833, the concept of "Andragogy" was not known in America until 1967, and Knowles wrote about it for the first time in his article "Andragogy not Pedagogy in Adult Leadership" in 1968 (M. Knowles et al., 2005, p. 61).

Distinctions between Pedagogy and Andragogy need to be discussed to fully understand the concept of Andragogy. Pedagogy means "the art and science of teaching children" and defines the pedagogical model of education as "an ideology based on assumptions or a set of beliefs about teaching and learning" (M. Knowles et al., 2005, p. 61). On the other hand, Andragogy is "the art and science of helping adults to learn." The andragogic model is not an ideology; it is a system of assumptions that apply to those in a learning situation (M. Knowles et al., 2005, p. 72). While the pedagogical model excludes andragogic assumptions, the andragogic model includes pedagogical assumptions (M. Knowles et al., 2005, p. 72). First, there was pedagogy, and then came andragogy. For this reason, in the 1980 edition of "*The Modern Practice in Adult Learning*," the subtitle of "Andragogy not Pedagogy" changed to "From Pedagogy to Andragogy" (M. Knowles et al., 2005, p. 61).

There are six assumptions about adult learners: 1) the need to know, 2) the learner's self-concept, 3) the role of experience, 4) readiness to learn, 5) orientation to learn, and 6) motivation. Assumptions about learners in the andragogic model are different from those in the pedagogical model (M. Knowles et al., 2005, pp. 64-72). In the case of Cuadernos Estrella, the existing in-person training program included a mix of andragogic and pedagogic assumptions. Even though all salespersons were adults, the in-person learners had a submissive role depending on the instructor. In addition, there was a lack of explanation on the need to know; the orientation to learn was not problem-centered, but subject-centered; and there was no clear motivation on salaries, promotion, and responsibilities. Therefore, I propose the Andragogy Model in Practice to use adult learning assumptions for planning future learning strategies.

### Adult Learning as a Practice within Human Resource Development

Holston and Swanson highlight the importance of HR development within organizations by saying that it is not only about training and management development. They describe HR development to be more than a concept but a vision. Their vision includes those of other authors like McGregor and Likert and reminds us that “organizations are human enterprises in their most vital essence” (M. Knowles et al., 2005, p. 136). The concept explains how organizations are complex and dynamic interactions of subsystems of people, equipment, materials, and ideas—highlighting that the input of human capital is more critical than the output of material capital (M. Knowles et al., 2005, p. 136). Their vision recognizes the role of the HR developers as crucial in the survival of organizations in the future.

The organization is conceptualized as a system of learning resources where the HR developers are the managers of this system. The ability to manage the system gives the HR developers a new role in designing the training. This new role allows them to manage the logistics and operate the training programs, courses, and workshops through a more active role in the decision-making process. Holston

and Swanson mention two questions that developers should be asking in organizations to disrupt traditional practices. The first question is "What are all the resources in our system that are potentially available for the growth and development of people?" The second question is "How can we make more effective use of these resources for the systematic development of our people?" (M. Knowles et al., 2005, p. 137). These questions were crucial for my personal experience as an HR developer for Cuadernos Estrella. For instance, since all training in the company was in-person, the idea of online training had never been not an option until Covid-19.

The company did not have the budget, infrastructure, culture, or willingness to design and implement an online training before Covid-19. However, the pandemic constrained choices and made the possibility of online training a reality. Remote training was imperative for the sales workforce since they are located throughout the Mexican territory. However, the reliance on in-person training at many locations reflected the lack of standardization in the sales processes due to the different sales zones and managers' training styles.

Given the urgency of the matter, the HR department decided in the [time period] to launch a pilot online training program through the Google Classroom platform. Google Classroom was an attractive option because it is cost-free and user-friendly for adult learners. According to Jane Hart's top tools for learning 2021, Google Classroom ranked 17 out of 200 for educational platforms. However, Google Classroom did not even appear in the ranking for workplace tools. The top three platforms for e-learning in the workplace were #13 Articulate, #27 Easy Generator, and #35 Moodle (Hart, 2021). The recommendation for the HR department is to explore platforms with relevant features for the workplace instead of focusing on platforms used for academic purposes.

## Andragogy in Practice

The Andragogy Model is a system of elements that can be adapted or adopted as a whole or in parts.

The most essential feature of andragogy is flexibility. To apply adult learning in practice, the Andragogy

Model offers HR Developers—like myself—an enhanced framework. There are three dimensions: 1)

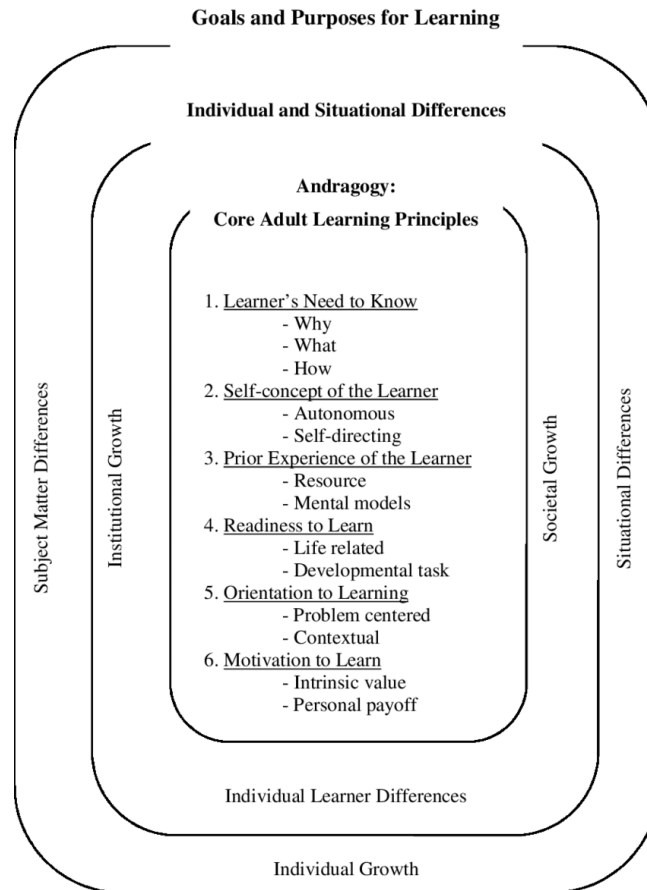
goals and purposes of learning to shape and mold the learning experience, 2) individual and situational

differences, which are the differences that impact adult learning individually, or in a specific situation, or

for subject-matter learning strategies, and 3) the core adult learning principles, for planning better adult

learning experiences. (See figure 2) (M. Knowles et al., 2005, p. 148).

**Figure 2. Andragogy in Practice Model**



Source: (M. Knowles et al., 2005, p. 149)

In Cuadernos Estrella, the pilot online training program curricula in [when] consisted of three modules: 1) Induction, 2) Excellence on Sales Processes, and 3) Leadership Development. Due to time constraints and a lack of standardization in content, only Module 1 (Induction) was launched, and the 99 sales employees used Google Classroom as their training platform for three months. The company has not yet collected data about the employees' interaction with the platform; however, it has collected the grades that learners got in their quizzes and tests and used them as a form of evaluation.

Module 1 of the online pilot training had sub-modules (each with a test at the end of the module that aimed to evaluate the acquired knowledge of employees). My concerns as an instructional designer are twofold. First, grades are not enough to measure the performance of salespersons. Second, I believe there was not enough pre-training on the use of the platform (Baby Boomers and Generation Xers had a hard time interacting with the platform, and this was reflected in their performance). As Holston and Swanson sustain, it is important to create and implement valid strategies for achieving learning goals and conduct valid assessments of learning (Holton & Swanson, 1997). The learning goals for the sales training program are 1) to standardize sales execution and processes within the Sales Department, and 2) to implement good practices for sales. I observed that the learning objectives were based on the needs of the company but not on the needs of the sales adult learners. Thus, coming back to the capacity development principles, “ownership” (which means local actors setting their own development goals) is crucial if the company aims to develop individual capacity. I propose the use of an andragogic learner analysis to better understand the needs of the learners.

The model of Donald Kirkpatrick is considered one of the most successful for evaluating HR development. According to Holton and Swanson, this four-step model is the most congruent with andragogic principles (Craig & Bittel, 1976). I present a brief description of the steps to better understand the concepts of evaluation. The first step is reaction evaluation, which is about getting data on the responses of participants to the program as it is happening and beginning modifications to the program. The second step is the learning evaluation, which consists of getting data about the facts, techniques, and principles acquired by participants (pre-test and post-tests). The third step is behavior evaluation, which reports actual changes after training compared with what learners did before training.



The fourth and final step is result evaluation, which consists of data collection on effect turnover, cost, efficiency, quality control, among other records within the organization (Kirkpatrick, 1975).

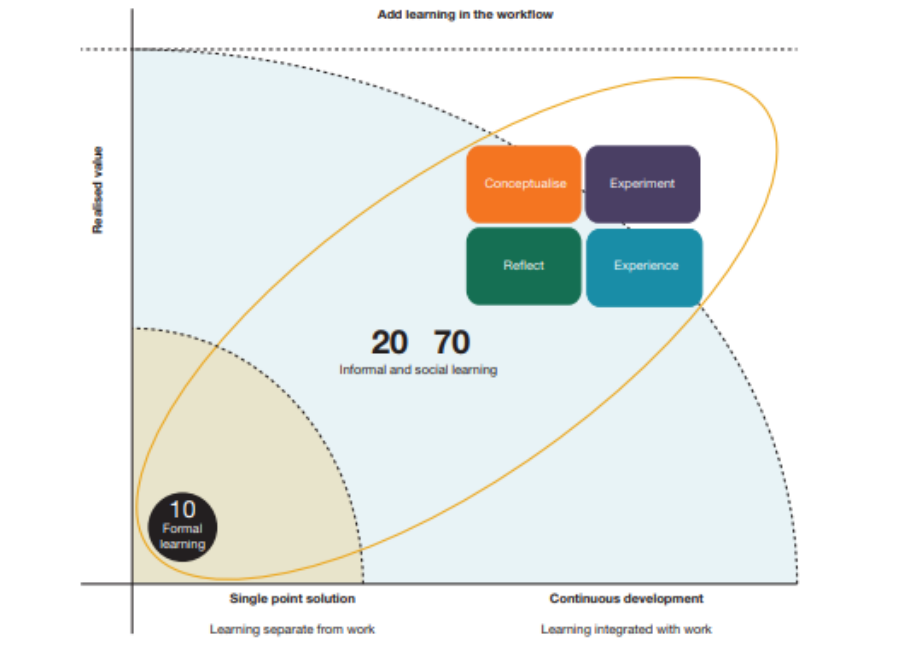
The limitation of this model is that it cannot control the variables that demonstrate that the training was, in fact, responsible for the changes that occur. Experts recommend the use of control groups when applying the model to control for the variables that are not related to the training (Swanson & Gradous, 1988). Likewise, experts mention that the use of qualitative evaluations such as participants observations, in-depth interviews, case studies, diaries, and other ways to get “human data” are crucial. The main idea is to get inside the minds of the participants by understanding “the social systems in which they are performing” (Patton, 1980). To develop human resources at the company, Cuadernos Estrella could use the principles of andragogy as a conceptual framework to understand how adults in the company learn and how HR developers can improve adult learning experiences. According to experts in HR Development, to potentialize learning and development in the workplace, performance-based learning is ideal to maximize the learning experience while boosting employees' performance.

### The 70-20-10 Learning Model

The HR Department selected the "70-20-10" performance-based learning model as the learning foundation for the initial online pilot training. Therefore, I use whitepapers from the 70-20-10 Institute—the developers of the model—to explain the model in action, the evolution of the model from training to performance support, and the new value creation for the model in the future. To devise a new learning strategy for training in the company, Professor Lisa Moreau recommended the application of the ADDIE learning model. First, I present a description of the ADDIE model (Analyze, Design, Develop, Implement, and Evaluate). Second, I explore the use of the model for sales training with examples of the book “Sales Training Basics.”

The main idea behind the "70-20-10" model is to create a culture of continuous learning as part of the daily workflow through working and talking with colleagues and experts and developing structured activities (C. J. Jos Arets, Vivian Heijnen,, 2016). The categories of 70, 20, and 10 inform how people learn and their habits of high performance. Thus, it is important to highlight that learning is context-dependent and that these figures are not written in stone. But, according to the model, the "70" category refers to experiential learning activities in the workplace or on-the-job learning; the "20" category is about social learning (learning through others); the "10" refers to formal learning. These categories offer HR developers different solutions; for instance, the "20" solutions include feedback, mentoring, and coaching. While the "70" solutions include information sources and quality content, the "10" solution entails training and development courses like e-learning. However, the figures that have the most impact on performance in the workplace are a mix of the "70" and the "20" solutions (C. J. Jos Arets, Vivian Heijnen,, 2016). The diagram shows that if you move from the "10" (formal learning) closer to the workflow (where the "70" and "20" informal learning lies), the potential for impact increases (see figure 4).

Figure 4. The “70-20-10” Model Diagram



Source: (Jos Arets, Charles Jennings, & Vivian Heijnen, 2016)

Experts recommend that HR developers begin with the development of "70" solutions. In other words, “start with options that produce fast and efficient results” (Anderson, 2015). Accessibility, speed of results, and the combination of smart technology with the aid of performance support successful on-the-job learning. People want to be able to improve when doing a task and this requires performance support. Therefore, informal learning or the “70” and “20” solutions combined with performance support work better than traditional formal learning or “10” solutions. A case study in the 2000s confirmed that learners needed more performance support and less training (Kalyga, Chandler, & Sweller, 2000). The value of performance support is to offer “just-in-time, just-for-you, and just-enough knowledge” to learners (Jos Arets et al., 2016).

The findings on the latest studies of the 70-20-10 Institute demonstrate that it is “impossible to connect learning to the business if learning and working are separated from each other.” (Jos Arets et al., 2016). Performance support provides guidance and support in the moment of need with the right amount of knowledge and information when doing a task (A. Rossett & Mohr, 2004). Therefore, for learning and development to thrive in business, it is necessary to create a culture of “learning by doing.” The idea of learning by doing is about disrupting the thinking of Learning and Development (L&D) by rejecting traditional learning paradigms and adopting a business one. For instance, it is relevant to understand the need to move from traditional learning to performance support for companies that wanted to increase “70” solutions to develop high-performance in the workplace. Also, it is crucial to understand the differences between performance support and learning support. On one hand, performance is directly associated with learning from work by assisting in working better. On the other hand, learning support focuses on ways to enhance learning as a different activity from working (Jos Arets et al., 2016). According to L&D experts, it is time to redefine the future of L&D by asking if the focus should be on learning value or should shift to business value. In the words of Jos Aret, “how L&D can have a ‘seat at the table’ instead of simply being on the menu” (Arets, 2017). In my own words and for personal reflection, the HR department should focus on the 70 and 20 solutions instead of just doing the 10. If the HR department adequately applies the 70-20-20 model with technical support, the entire learning strategy would change and boost performance amidst disruptive times.

### The ADDIE Model for Sales

Another model that has proven successful again and again for instructional system development is the “ADDIE” model. ADDIE stands for “Analyze, Design, Develop, Implement, and Evaluate.” The model intends to focus on one element at a time by ensuring that the element has been completed correctly

before moving to the next one (Lambert, 2016). The analysis phase suggests that HR developers should collect data on the needs of the organization and learners for sales training. They should also think critically about the goals and objectives of the sales training, the sales trainees' profiles, how the training will be delivered, and what the resources and constraints for doing the project are (Siegfried, 2010). The design phase is the planning stage and consists of developing instructional objectives, tests to show knowledge of tasks, expected competencies and skills, and the curricula for the courses (Siegfried, 2010). The next phase is development, which is about selecting and creating content based on the learning objectives. This entails the instructional plan, training materials, training methods, and program evaluation materials (Siegfried, 2010). Then comes the implementation, which is about teaching the training program to the learners. Finally, the evaluation stage is an ongoing process of developing and improving the materials during and after the training (Siegfried, 2010).

Experts argue that there is no "right way" when training salespersons since individuals are unique, and organizations vary in size and have different scopes. One of the challenges when designing training is to be able to improve your training constantly and reevaluate how your organization sells and who sells in your organization. The principles of the ADDIE model help HR developers define what selling competencies—knowledge, skills, and abilities—are required to successfully perform the selling processes and what the most cost-effective methods for allowing salespersons to perform better are (Lambert, 2016). According to the study "Trends and Implications of Models, Frameworks, and Approaches Used by Instructional Designers in Workplace Learning and Performance Improvement," the ADDIE model is one of the most adopted models within for-profit organizations (Lisa A. Giacomo & Jeroen Breman, 2020).

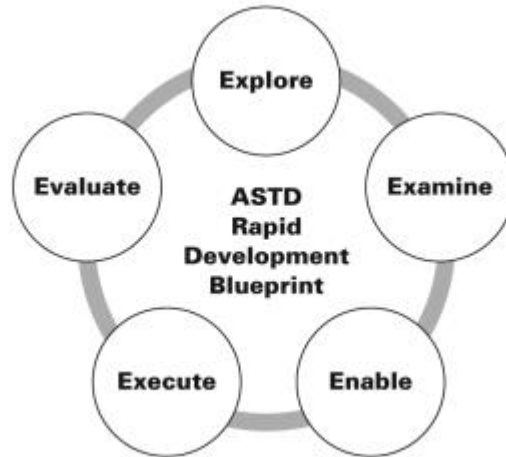
**Table 2. Models Used by Sector**

<b>ID MODELS</b>	<b>TOTAL (N = 126)</b>	<b>FOR-PROFIT (N = 61)</b>	<b>NON-PROFIT / NON-GOVERNMENTAL (N = 23)</b>	<b>UNIVERSITY/ VOCATIONAL (N = 42)</b>
ADDIE	76.98%**	72.13%**	95.65%**	73.81%**
Agile	57.94%*	63.93%**	65.22%**	45.24%*
CADDIE	26.98%*	27.87%*	17.39%	30.95%*
Cognitive apprenticeship	14.29%	14.75%	13.04%	14.29%
Cognitive load overlay	30.95%*	32.79%*	26.09%*	30.95%*
Dick, Carey, and Carey	23.81%	16.39%	26.09%*	33.33%*
Integrative learning design	2.38%	1.64%	4.35%	2.38%
Merrill's first principles	36.51%*	34.43%*	39.13%*	38.10%*
Own it, share it, use it	0.79%	1.64%	0.00%	0.00%
Rapid prototyping	59.52%*	62.30%**	56.52%*	57.14%*

Source: Giacomo & Breman 2020 (page 146).

The ADDIE model seems appropriate for the context of the workplace in Cuadernos Estrella and could help the HR Department develop good foundations for the design of the learning strategy. However, other challenges—such as trends and practices that affect sales—arise when designing sales training. For instance, some of the most common macro trends are globalization, competition, technology, demographics, and today, the Covid-19 pandemic. Thus, to achieve high performance for sales teams' experts, experts recommend three pathways: sales training, sales coaching, and enabling technologies. One of the latest tools is the five-phase "Rapid Development Blueprint for Sales Training," which incorporates five steps: explore, examine, enable, execute, and evaluate (see Figure 5 and Table 4).

**Figure 5. Rapid Development Blueprint for Sales Training**



Source: Angela Siegfried, 2010 (p. 33).

**Table 4. Rapid Development Blueprint for Sales Training: Key Actions and Key Outcomes**

Phase	Key Actions	Key Outcomes
Explore	<ul style="list-style-type: none"> <li>• Identify the business problem to be addressed by the training</li> <li>• Conduct interviews and assessments</li> <li>• Gather information for creating content</li> <li>• Identify the sales culture of the company</li> </ul>	<ul style="list-style-type: none"> <li>• Determine business goals</li> <li>• Determine the current state of the sales environment</li> <li>• Identify the competencies and skills to be mastered</li> <li>• Identify the change management approach you need to take</li> </ul>
Examine	<ul style="list-style-type: none"> <li>• Quantify gaps in business goals and results</li> <li>• Identify competency gaps</li> <li>• Set the scope for the training</li> </ul>	<ul style="list-style-type: none"> <li>• Asses individual performance gaps</li> <li>• Identify competencies and topics to be addresses by the training</li> <li>• Assess resource availability</li> </ul>
Enable	<ul style="list-style-type: none"> <li>• Decide to buy or build a training solution</li> <li>• Develop training programs that matter to the learners</li> </ul>	<ul style="list-style-type: none"> <li>• Have a training that support the learners</li> <li>• Have a sales training program based on proven best practices</li> </ul>

<p style="text-align: center;">Execute</p>	<ul style="list-style-type: none"> <li>• Select appropriate delivery modalities</li> <li>• Leverage the power of blended learning</li> <li>• Prepared to be a facilitator</li> <li>• Prepare to coach learners after training and conduct coach-to-coach sessions</li> </ul>	<ul style="list-style-type: none"> <li>• Have a training plan that supports both, the sales strategy and individual learning.</li> <li>• Deliver targeted, effective professional sales development programs</li> <li>• Use cost-effective, user friendly methods and modalities, and support learners through the entire learning process.</li> </ul>
<p style="text-align: center;">Evaluate</p>	<ul style="list-style-type: none"> <li>• Measure the reaction of learners to the training</li> <li>• Measure the level of training that actually occurred</li> <li>• Assess if the lessons are transformed into behaviors</li> <li>• Assess and measure the impact of training on performance</li> <li>• Used what is learned on the evaluations to improve</li> </ul>	<ul style="list-style-type: none"> <li>• Know how the training impacted performance</li> <li>• Gaining insights for continuous improvement of the program</li> <li>• Gathered information to find the ROI of the program</li> <li>• Integrate effective evaluation methods</li> <li>• Conduct gap analysis to target better training solutions</li> <li>• Make decisions about training methods that best support the learning process.</li> </ul>

Source: Angela Siegfried, 2010 (p.34-40).

The Blueprint helps HR developers to diagnose training challenges, minimize costs, and support the learners (Lambert, 2016). However, for the application or the design of training with impact, experts recommend using the traditional seven steps for sales methodology. The seven steps are: prospecting, pre-approaching, qualifying, presenting, overcoming objections, closing, and following up (see Table 5). These steps help HR developers and sales managers in the co-creation of customized sales training solutions (Siegfried, 2010).



## Sales Training Principles and Models

In this section, I explore available literature on sales training, trends, and principles. First, I explain the seven-step sales methodology—the most used for sales training in organizations. Second, I explore the role of ICTs (Information and Communication Technologies) in training for sales and the “Sales Education and Training 2.0” research, which explores a variety of articles related to school-dependent sales education. Finally, I review an interesting article about leadership skills for sales managers.

One of the most used sales methodologies found in the literature was the "Seven-Step Sales Process." This methodology depicts the organic steps that happen when a seller and a buyer interact. The seven steps are prospecting, pre-approaching, qualifying, presenting, overcoming objections, closing, and following up (Siegfried, 2010). In the case of Cuadernos Estrella, the HR Department uses a five-step methodology in which the pre-approach and overcoming objection steps are not included in the sales training. To enhance the sales training program, I propose that the HR Department re-visits the methodology and includes the missing steps to their sales process (see table 5).

**Table 5. Seven-Step Sales Process: Sales Methodology**

<b>Step</b>	<b>Description</b>
<b>Prospecting</b>	The ability of a salesperson to identify and connect with potential costumers
<b>Pre-Approach</b>	Prior research about the prospect to better understand the environment that will be encountered
<b>Qualifying</b>	Identify if the prospect is worth the time and attention of the salesperson to pursue a relationship
	The attempt to match what the salesperson company offers with the needs of the prospect. This step is

<b>Presenting</b>	defined by a commitment of both parties to discuss and determine if the selling company can best serve the buying one. (Resistance in the process)
<b>Overcoming Objections</b>	The ability of a salesperson to handle prospects objections and resistance
<b>Closing</b>	The ability of a salesperson to move a conversation towards completion and identify the right time to ask the buyer when to buy
<b>Follow-up</b>	Fulfil the promises made by the selling company

Source: Angela Siegfried, 2010 (p.41-44).

Another interesting finding in the sales training literature is the use of ICTs (Information and Communication Technologies). A group of researchers in Colombia compiled an extensive literature review on sales training trends for the past 20 years. The paper concludes that ICTs strengthen sales training in terms of relationship, opportunity, and flexibility to communicate with the client (Torres, Chiappe, & Segovia, 2019 ). The literature review demonstrated that there is a deep connection between HR Management and sales training. HR Developers are the ones who “select, enroll and ensure the permanence of members in the organization” (Storey, 2007). Ideas extracted from the literature related to HR Departments and sales training mention the following key factors to design a successful training with the help of ICTs (Torres et al., 2019 ).

- The use of sales channels enhanced with digital technologies
- The use of alternative means for training (not traditional)
- Enthusiasm and creativity as important seller skills for negotiation with clients
- Adequate selection of personnel to train
- Effective transfer of knowledge into sales practice
- The perception of sales training as a growth factor of a professional career within the organization

- Receive prior training on new products
- Face-to-face evaluation with each employee regarding their results and adjust their training plan
- Experiential learning as one of the best ways to train sellers

In this compilation, experts explain that organizations invest a lot of effort and resources to develop their commercial staff skills to be productive because the productivity of the organization is directly associated with sellers' efficiency or the ability to put products in the market and increase income (Chan, Li, & Pierce, 2014). Other authors agree that adequate personnel ensures the appropriation of knowledge (Gope, 2018). On the other hand, experts like Paulson explain that the key to success is an effective recruitment process and continuous training (Paulson, 2018). Yet other experts like Costa sustain that designing sales training processes through experiential learning "allows sellers to solve problems, learn by doing, reflect critically on theory, and participate in real-life situations, enabling them to assimilate knowledge" (Costa, Santos, & Wach, 2018). Ibrahim et al. propose a study to assess the effect of soft skills training on work performance. Their findings demonstrate that 14.5 percent of the sellers increased their productivity and that if the training was fragmented and workers had enough time to reflect and internalize the content their work, performance increased and reached 27.9 percent (Ibrahim, Boerhannoeddin, & A. and Bakare, 2017). The findings of Costa and Ibrahim were the most relevant for me as an HR Developer to devise the new learning strategy for the company. Thus, I recommend that the HR Department explores the possibility of training sellers through a "learning by doing" approach with the support of other tools like role-playing, simulations, and case studies to promote experiential learning. These tools will facilitate interactions not only with end-users but also with resellers (the company's business model includes selling to wholesalers y retailers).

In another article, “Sales Education and Training 2.0,” Cummins et al. analyzed articles related to sales education literature, sales curricula, and sales center leadership published between 2005 and 2019 (Peltier & Deeter-Schmelz, 2020 ). This paper confirms that the number of articles related to sales education increased 69 percent after Cummins et al. in 2013. Also, the authors explore three large categories of sales education: experiential learning, career development, and assessments. The article explains that sales curricula are school-dependent, which means that most of sales education in the US happens in academic settings and that the most demanded courses are Introductory Sales (97%), Advanced Sales (90%), Sales Analytics (65.4%), Sales Management (61.7%) and Negotiation (61.7%). For this research, I found it relevant that although Sales Analytics (which includes business intelligence or the ability to interpret sales data) is a highly demanded topic in sales education, it is undertaught. Therefore, I would like to further explore if this topic would be relevant to incorporate in the training proposal (since the company did not include Sales Analytics in their training curricula). Most importantly, it raises the question for the company to revise whether the sales training program could be delivered by a National Sales School in Mexico that certifies salespeople with an academic degree.

Another important factor in sales training trends is the development of leadership skills, which is a consistent feature throughout the sales training literature. In the case of Cuadernos Estrella, there is not a concrete strategy for developing leadership skills for sales managers. Therefore, I explore an article titled “Key Leadership Skills of Great Sales Leaders” by Longenecker & Mallin, which provides a list of the top nine skills that HR Developers should develop in future talent (Longenecker & Mallin, 2017). The top 9 skills are:

1. Emotional Intelligence, which is the ability to understand and manage the emotions of others. It involves self-awareness, self-regulation, social skills, and empathy (Longenecker & Mallin, 2017)

2. Coaching and people development. Consists of providing ongoing feedback and encouragement to improve the salesperson performance (Dahling, Taylor, Chau, & Dwight, 2016)
3. Creating clear performance expectations and accountability for results
4. Problem-solving and conflict resolution skills
5. Engaging, motivating, and creating ownership of desired outcomes
6. Strategic planning and execution
7. Character and integrity
8. Data mining, analytics, and technology usage (using CRM customer relationship management and SFA salesforce automation is recommended for strategic focus)
9. Time and priority management

The article highlights that a common mistake companies make when designing training is that most of the budget is allocated to the development of the salespersons, but rarely to the development of sales managers. (Even though the sales managers are the leaders and the ones who should be coaching and creating talent within the organization.) In the words of Mallin, “if your organization’s sales leadership is not exceptional, your organization’s sales efforts will never reach their full potential” (Mallin, 2018). In February 2021, the HR Department in Cuadernos Estrella hired a third party that developed a one-year specialized program for the sales managers called “Champions.” Allocating the budget for the Champion program was a big step for the sales training efforts in the company since it was the first time that the company invested exclusively in its sales managers. The sales managers are the ones in charge of training their entire sales team. Therefore, the blended learning strategy with the virtual training through the Google platform could help managers to reduce training time, movement costs, and encourage them to create standardized content.

## Virtual learning and Blended Learning

Blended learning approaches help HR Developers balance human capital, financial, and technical resources to provide a personalized learning experience through a smart mix of formal and informal learning methods. Prior to the pandemic in 2016, the findings of the Training Industry Report in the US demonstrated that 47% of the mid-size companies use e-learning for training and 43.2% use instructor-led training, while 41% used blended learning (Srichand Devarakonda, 2019). These findings made it clear that blended learning is becoming more popular for HR Developers in designing new learning strategies for training.

The definition of e-learning is “the delivery of a learning, training, or education program by electronic means.” E-learning can be delivered through virtual classrooms, be computer-based, online, or mobile (Li, Lau, & Dharmendran, 2009). Recent studies such as “Economy 4.0” explain that before the pandemic, sales training and professional practice were going to be developed in digital environments with artificial intelligence, robotics, big data, and the internet (Rodriguez, Honeycutt, & Ragland, 2015). In the case of Cuadernos Estrella, not all salespersons have a personal computer. Therefore, mobile devices provided by the company are the means for having online training.

In the article “Calculating the Economic Viability of Corporate Training (Traditional & eLearning) using Benefit-Cost Ratio (BCR) and Return on Investment (ROI),” Devarakonda compared online training and traditional classroom training. He mentions that there is a belief that e-learning is more cost-effective since the costs of hotels, conference rooms, food, and other expenses are eliminated. However, Wentworth suggests that e-learning courses are, in fact, more expensive to create, costing around 50,000 dollars per course (Wentworth, 2016). Also, other studies conducted in 2002 demonstrate that learners are less satisfied with self-paced e-learning and preferred instructor-led training (Sikora &

Carroll, 2002). Thus, Deverakonda explains that traditional learning proves to be adequate for smaller or local companies, while e-learning is better for global corporations (Srichand Devarakonda, 2019).

In the article “Transforming Remote Salesforce Training: Guidelines for Integrating E-learning into an Existing Remote Salesforce Training Program - A Case Study,” Donohoe, Baugh, and Rota had opposing views. Their research focused on how a training department of a mid-size company in the US would integrate e-learning into their existing instructor-led salesforce training program. They surveyed and interviewed a cross-section sample of 125 people with different roles within the sales force. They found that e-learning was very attractive for the learners, who expected that they would save time, travel, and resources. Also, they found that access was simple and available 24/7, and it was going to be learner-centered. Beyond product knowledge, it was going to include the development of business skills, and their performance was going to be better tracked. The researchers presented a blended learning proposal through an Ishikawa Diagram representation. In addition, they introduced a set of guidelines for trainers on how to integrate e-learning. In the Diagram, they mapped out several key concepts regarding blended learning such as adult learning, training solutions, expectations, and LMS learning management systems.

The researchers explain that the success of the approach will depend on the commitment and vision of the sales managers and training departments. Besides applying the guidelines, they recommend doing a “proof-of-concept” project on a smaller scale to prepare the learners in technology skills to access e-learning solutions (Donohoe, Baugh, & Rota, 2006). For the new learning strategy in Cuadernos Estrella, the challenge is to disrupt the belief that training has to be traditional and encourage the use of new technologies to devise an e-learning strategy using smartphones while keeping instructor-led training.

The first e-learning interaction the company's salespersons had was through the Google Classroom platform in April 2021. As mentioned before, the learners interacted for three months with the platform and completed Module 1 online, which incorporated the organizational culture and values of the company (not yet anything related to sales). However, an important factor arose during this "proof-of-concept" project for the HR Department. This concern was related to how to keep the learners engaged in an online setting. In the article "Learning How We Learn," five factors to overcome the challenges of online learning were introduced by Arghode et al. (2018). The authors mention that there are four types of learner engagement: behavioral, cognitive, psychological, and emotional. In the findings, three recommendations are given for instructional designers in the context of the workplace. First, design intuitive structured courses. Second, develop empathy and understand the learners. And third, offer clear and regular directions (Arghode, Brieger, & Wang, 2018). In addition to learner engagement, five factors were identified to overcome online challenges that learners face:

- Interpersonal skills. The instructor's frequent posts and messages, or answering questions in real-time show the instructor's availability and strengthen the instructor-learner relationship.
- Instructor role. The role of the instructor is to help learners "perform better in tests, sustain study for longer periods, help other people in an online environment, and deal with the psychological challenges of online learning" (Arghode et al., 2018).
- Instructional design. Safety, meaningfulness, and availability of the contents (Arghode et al., 2018).

In the case of Cuadernos Estrella, it is crucial that the HR Department further explores through surveys and interviews how to keep learners engaged. The HR Department has little information about the learners and what motivates them. Therefore, the findings in the interviews and surveys will inform the trainers about the learners' motivations, their affinity with the content, their interests, the time they invest, what technologies they use, the effort they put into learning, and how this affects their work.





## Chapter Four: Discussion

### Conclusions

The analysis of the literature helped me as an HR developer to devise a new learning strategy for the sales training program of Cuadernos Estrella. I propose a roadmap that incorporates a working plan derived from the first two phases of the ADDIE model: Analysis and Design. These steps are the initial stages to develop a standardized performance-based sales training. My findings provide the HR department with a theoretical guide of best practices and recommendations to enhance the existing in-person sales training. The roadmap serves as the foundation of a working plan to develop a blended training approach for the sales workforce in 2022.

### Recommendations

**Managers should see training as an investment.** As Nda and Fard note, “organizational leaders must see continuous employee training and development as invaluable” (Nda & Fard, 2013). The paper industry in Mexico is very traditional and conservative in its practices regarding training and development. Training is often considered an expense rather than an investment. Most pieces of training are formal and happen in person, which implies a cost of movement. They usually occur in a classroom setting, which entails rent costs. In addition, they are usually facilitated by an expert (who is hired and comes from an external company). Therefore, managers need to be willing to invest in human talent and make training a priority. In the case of our company, the budget allocated for training was reduced because of an important decrease in sales due to school shutdowns during the pandemic. Consequently, the budget adjusted to the circumstances, and training was not a priority. Despite these circumstances, the HR department must consider training investment as part of the budget analysis.

**Cuadernos Estrella should offer training for employees to remain in the organization.** Organizational leaders are afraid of investing in training because of the fear of employees leaving, but a survey conducted by West U'C's Digital Media Services in 2015 showed that sometimes employees leave because they do not receive training (Srichand Devarakonda, 2019). In the case of the company, the sales department has the highest rates of employee turnover. Literature suggests that a good training strategy makes companies more competitive. In addition, offering training and growth opportunities can influence the employee positively to remain in the company and even perform better.

**Training is crucial for employees to be aligned with the general business strategy and culture of companies.** In the words of Rivera and Paradise, "the ultimate goal of any organization is to assure that their employees are aligned with the strategy and goals of the company" (Rivera & Paradise, 2006). My goal as an HR developer is to connect people with the higher purposes and values of the company. These purposes for me mean to "be better," cleaner, environmentally friendly, and not exploitative in our supply chain (sustainable), and to "do things right," which means being fair, be equitable, accountable, and doing things with ethics according to our values: reciprocity, compromise, integrity, and excellence. Recently, we transformed our organizational culture and modified our mission and vision to be more aligned with the realities of our planet and the after-pandemic world. The mission of the company is to become the most ethical and sustainable notebook company in Mexico. Effective training is one of the best allies for the company to accomplish these goals and turn them into best practice behaviors.

**An adequate form in which managers could measure failure or success in a training program is through the analysis of the Return of Investment (ROI).** In 2016, the independent researcher Devarakonda explained that the true success of training is that employees could transfer what they

learned and consequently apply it to their job activities with the ultimate goal of making a profit for the organization (Srichand Devarakonda, 2019). In the case of the company, measuring the results of training is crucial for managerial buy-in and investment for training. The HR department could evaluate the in-person training in terms of ROI to find whether more budget is required for continuous improvement and a better sales performance.

**Adult learner principles keep learners motivated and enable them to transfer learning to their work tasks.** Data demonstrated that the application of andragogy principles into training keeps learners motivated and enables them to transfer new skills, knowledge, and learning to their work tasks (Požega, Crnković, & Mađarić, 2019). For the new learning strategy to be successful, it is crucial that the training is rooted in the use and application of andragogy principles. In the case of the company, the HR department focuses on the training needs or skills that the organization aims to develop. However, there is not enough inquiry on the actual needs of the sales learners, nor their motives for learning and transferring knowledge.

**"Learning for performance" processes increase learning effectiveness and training efficiency.**

Performance-based learning models have proven to benefit organizations in the improvement of workforce performance, quality of service, worker satisfaction, and improvement of decision-making (IntraHealth International Inc, 2007). For the purpose of the roadmap, the ADDIE model is the foundation of a working plan that aims to create a blended learning approach for the sales workforce step by step.

**Use formal learning as the foundation of experiential and social learning.** For the application of the "70-20-10" model, experts recommend "making the most out" of the 70 solutions (experiential learning), "do not forget about" the 20 solutions (social learning), and "be aware of" the 10 solutions

(formal learning) (McGarry, 2019). For the online training pilot, the HR department used the "70-20-10" model. In the literature reviewed, experts highlight that HR developers should focus more on developing experiential learning and social learning combined with performance support instead of investing too much time and energy in formal learning. For the pilot online training in the company, the content was merely formal learning through PowerPoint presentations and tests applications. To develop 70 and 20 solutions for creating content in the future, the HR department could use learning tools such as case studies, scenarios, simulations, and role-playing.

**Performance support combined with smart technologies is the new trend for mobile learning (m-learning).** Performance support “is a repository for information, processes, and perspectives that inform and guide planning and action” (A Rossett & Schafer, 2007). Smart technologies are key for developing the blended learning strategy. According to information provided by the HR department, most sales learners use smartphones as their preferred device for training (because most of them do not have personal computers or good internet connections within their sales territories).

## Reflection

Looking forward to my role as an instructional designer for the HR Department in 2022, I will use the roadmap as the foundation for developing a new blended learning sales training program for the company. The application of my research into practice will allow me to explore my role as a change agent. On top of developing a new learning strategy to standardize the sales processes, I am deeply moved by the idea of making our company more ethical and sustainable. Incorporating ethics and sustainability in the mission of the company is the latest innovation in our 74-year-old cultural organization. Those two words are the ones I am clinging to for the future of the company. Ethics and

sustainability are complex ideas, sometimes scary ideas for older generations. However, those ideas are the ones that will define whether the company will survive the upcoming crisis after the pandemic. As mentioned before, training is crucial for employees to align with the company's goals. Therefore, it is essential to ensure buy-in from my colleagues in the company. But most importantly, we must "change" how we behave individually and collectively to achieve these goals not only for the company but for the planet. Personally, it is a privilege to get involved in the development of training programs because this represents the first step for directing the company's operations towards sustainability and taking the next steps for positive change to happen.

The opportunity to be part of the MALS (Master of Arts in Liberal Studies) program broadened my perspective and enriched my system of thinking. The diversity and flexibility of the program reminded me that disciplines such as ethics and humanities sometimes are underestimated when talking business. Yet, giving these disciplines the importance they deserve in organizations will lead to sustainable change and human flourishing in the workplace. Theories such as adult learning and the use and application of performance-based learning models allowed me to have solid foundations to develop better learning strategies for training. Amidst the pandemic, businesses and business leaders needed to change their mindsets and be better for the planet and the people. Training is the link that connects the values and interests between the employer and the employee. Moreover, good training aligns these values and interests with those of the company, connecting people with their core values and purpose. Companies are successful when people work together for the same purpose. The challenge of businesses in the future is that we can no longer afford to do "business as usual." Therefore, business leaders need to modify their purpose. World leaders need to invest more time being curious and having the willingness to have their hearts and minds open to see things through different lenses. In my personal journey, I had

the willingness to change things but did not have enough tools. However, my master's program provided me with new lenses and knowledge that will prepare me to find a new place in the world as a changemaker. As the next steps of this research, I would like to further explore change management and how to use it for the company. Likewise, I look forward to applying the remaining phases of the ADDIE model, namely the development, implementation, and evaluation of the novel blended training in 2022.

## Appendix: Cuadernos Estrella Roadmap

# Roadmap for the HR Resources Department of Cuadernos Estrella

## Devising a New Learning Strategy for the Sales Training Program

Based on

“The Learning for Tech ADDIE Toolkit”

by

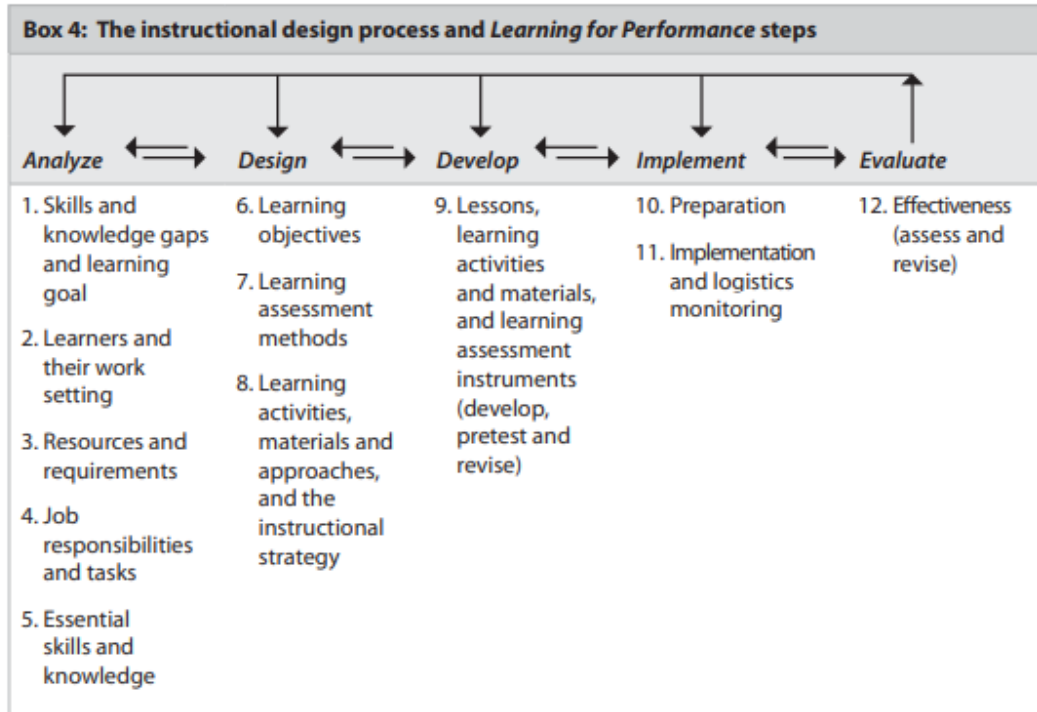
Lisa Moreau



## Introduction

For the purpose of this roadmap there will be three sections to inform the HR department which are the best practices and recommendations according to the research findings. In the first section there is information about how to use the ADDIE model according to the learning for performance Intrahealth package in the context of the company. In the second section I will focus on the Analyze and Design phase of the ADDIE model in the context of the company since the full model application (develop, implement, evaluate) was not feasible because it is considered to be experimenting with human subjects. And finally, in the third section, I present a workplan proposal using the five phases of the ADDIE Model for the sales training.

## Instructional Design Process for ADDIE



# Analysis

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1. Understand the problem before developing a solution

## The Existing in-person Training

The current sales training for sales agents and promoters is a one-day in person training. The training consists of an 8-hour oral exposition provided by an appointed employee of each department in the company. Basically, the salesperson visits the factory and meets one person of each department who explains the role, responsibilities, and activities related to the sales processes. The sales managers are the ones in charge of coaching and training the sales agents and promoters after the in-person training in the factory.

## The Pilot Online Training

In April 2021 due to the Covid-19 pandemic the HR department launched a pilot online training project through the Google Classroom Platform. The sales agents and promoters interacted virtually for three months in the first e-learning mode of training. For time constraints just one out of three Modules was launched. Module one included corporate information such as: company induction, introduction to the job position rights and responsibilities, organizational culture and values, safety measures, and code of ethics. Module One was evaluated through tests and quizzes, each agent and promoter received a pass or fail grade according to their performance.

## Knowledge Gaps

The sales managers do not have a standardized form of training which generated important differences within the sales processes and training quality between sales regions. According to the non-identifiable

information provided by the HR department at the company, the following skills are the ones to be developed at the individual level within the sales agents and promoters with the sales training:

Hard Skills	Soft Skills
Introductory Sales	Negotiation
Sales Techniques	Client Service
Sales Effectiveness	Sales Psychology
Basic Activities for Sales Agents	Change Adaptability
Product knowledge	Creativity
Client Classification	Teamwork
Standardize Execution	Effective Communication
Inventory	
Image and Exhibition	
Product Promotion	
Prospection	
Time Administration	
Office Package Computer Basics	

Source: Cuadernos Estrella HR Department

### Specify the Learning Goal Related to the Gap

The new learning strategy proposes the design of a standardized performance-based training with a blended learning approach using the ADDIE Model.

### Learn about the Learner and the Work Setting

The HR department of the company provided the results of two analysis (Generational and Learning Styles) with non-identifiable information about the learners.

**PRIMARY AUDIENCE:** Sales Agent



Description

Age: Boomers/Generation X/ Millennials  
Job role: Sale CE products  
Technical skills: High  
Learner preferences: In-person formal training  
Learner constraints: Technology/lack of devices (laptop/computer)/lack of internet infrastructure  
Technology, Device, and Platform preferences: Smartphone  
Desired outcomes for training: Unknown

**SECONDARY AUDIENCE:** Sales Promoter



Description

Age: Generation X /Millennials/Generation Z  
Job role: Sale in store CE products  
Technical skills: Medium  
Learner preferences: Online experiential learning  
Learner constraints: Technology/lack of devices (laptop/computer)/lack of internet infrastructure  
Technology, Device, and Platform preferences: Smartphones  
Desired outcomes for training: Unknown

### Identify Existing Resources and Requirements

Identify major new responsibilities and the task associated with them. I recommend to the HR department to use tools like the great training checklist to re-frame the in-person training strategy.

### Determine Job Responsibilities Related to the Gap

Description of job responsibilities related to the gap. For example, for the purpose of launching Module II online in 2022, the role and responsibilities for instructional designers need to be re-defined.

<i>Consider the questions in the column on the left and describe the gap in the space to the right.</i>	
<b>B. Job Expectations Gap</b> <ul style="list-style-type: none"> <li>• Do workers know what they are expected to do and how well they are expected to do it?</li> <li>• Do workers have written job descriptions, standards, job aids, etc.</li> </ul>	If no, describe the problems in this area.
<b>C. Feedback Gap</b> <ul style="list-style-type: none"> <li>• Do individual workers receive feedback on what they do well and what needs to change?</li> <li>• Do workers receive feedback on performance of the facility where they work?</li> </ul>	If no, describe the problems in this area.
<b>D. Work Environment Gap</b> <ul style="list-style-type: none"> <li>• Is the physical environment adequate? (e.g., water, power, space, ventilation, privacy, repairs needed)</li> <li>• Are the necessary tools, equipment and supplies available when and where they are needed?</li> </ul>	If no, describe the problems in this area.

Source: Performance Factor Worksheet the Intrahealth Learning for Performance Package, p.19 (2007)

## Specify Essential Skills and Knowledge

1. Essential skills: What does the worker need to be able to DO to perform the job to standard?
2. Essential knowledge: What does the worker need to KNOW to perform the job to standard?
3. Essential attitudes: How does the worker need to BEHAVE to perform the job to standard?

# Design

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1. Design Learning Objectives
2. Decide how to assess learning objectives
3. Create the instructional strategy through the program description, criteria for learners, schedule of activities with training methods, evaluation methods and course duration.

### Chart for Designing Learning Objectives:

LEARNING OBJECTIVE	PERFORMANCE (OBSERVABLE, MEASURABLE)	CONDITION OF PERFORMANCE	CRITERIA OR STANDARD

Source: Lisa Moreau Learning Tech Bootcamp Toolkit, p.5 (2021)

### Chart for Assessing Learning Objectives

- For each learning objective, select an assessment method that will measure the behavior specified (IntraHealth International Inc, 2007). An example of a suggested form on how to assess the learning objectives of the online training for the company will be presented using the Box 13 from the Learning for Performance Intrahealth package.

Type of Performance	Learning Objectives	Written Tests	Learner Interviews	Learner Questionnaires	Supervisor Interviews	Observation (Behavioral)	Observation (Cognitive)	Client Records	Learners Activities Plans	Other
Information Recall	■	■	■							
Motor Skills						■				
Decision Making and Problem Solving	■	■		■	■		■	■		
Attitudes	■		■		■				■	

### Create an Instructional Strategy

#### Example of Cuadernos Estrella Program Description

This is the current program description of Cuadernos Estrella’s online training launched in April 2021.

# Program Description Example



Module I Organizational Values	Module II Operational Excellence	Module III Leadership Development
<ul style="list-style-type: none"> <li>• Introduction to the company</li> <li>• Job description and induction</li> <li>• Organizational Culture</li> <li>• Security and Safety training</li> <li>• Medical Services training</li> <li>• Code of Ethics</li> </ul> 	<ul style="list-style-type: none"> <li>• Introductory Sales</li> <li>• Sales Techniques</li> <li>• Sales processes</li> <li>• Tools for effective sales</li> <li>• Salespersons Basic Activities</li> <li>• Negotiation abilities</li> <li>• Client Service</li> <li>• Product Knowledge</li> <li>• Organized Sales</li> <li>• Sales at the Store</li> <li>• Standardize Sales Execution</li> <li>• Planograms</li> </ul> 	<ul style="list-style-type: none"> <li>• Time Administration</li> <li>• Work by processes</li> <li>• Leadership management</li> </ul> 

Source: HR Resources Department Cuadernos Estrella (2021)

## Workplan for Cuadernos Estrella blended Sales Training 2022

Task	Development	Responsible	Feedback	Dates
<b>1 Analyze (Task Resume)</b> 1.1 Develop a new blended learning strategy for sales training 1.1.1 The training goal is to standardize the sales processes within the three different sales zones, so that all the salespersons	Identify and select members that Will develop the Project. Similarly, chose a diverse sample to conduct surveys an interviews  Job description of the sales agents and promoters  Research on Literature about sales training	<b>RH/SALES</b>	<b>HR MANAGER</b>	<b>Effort level in days:</b> <b>RH- 1 month</b> <b>Sales- 1 month</b> <hr/> <b>31 days</b>  <b>Initial Date:</b> December 2022  <b>Termination Date:</b> December 2022

Task	Development	Responsible	Feedback	Dates
<p>have access to the same training on sales execution, processes, and best practices</p> <p>1.2 Conduct a needs assessments to better understand the audience and their interaction with their work setting</p> <p>1.3 Assign a responsible and define responsibilities within the departments involved in the project</p> <p>1.3.1 Identify the knowledge gap in skills, competencies, attitudes, or behaviors.</p> <p>1.4 Identify external and internal resources to develop a blended learning strategy</p> <p>1.5 Identify essential skills, abilities, or competencies to be developed in the training</p>	<p>trends and best practices</p> <p>Literature review revision and use of desk review tools to plan the strategy</p> <p>Assign a meeting day with the departments involved in the Project for buy-in and agenda coordination to create a plan schedule</p> <p>Assign dates for follow-up regular meetings with HR and Sales</p> <p>Assign deadlines for the deliverables of the analyze phase and have a meeting to present and discuss the findings</p>			<p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>Needs Assessment</li> <li>Generational Analysis</li> <li>Learning Style Analysis</li> <li>New Technologies Analysis</li> <li>Learning Strategy proposal based on a performance-based learning model (70-20-10 model)</li> <li>Job descriptions with the expected skills or competencies to be developed</li> </ul>
<p><b>2. Design</b></p> <p><b>(Task Resume)</b></p> <p>2.1 Design and review goals and objectives for the blended sales training</p>	<p>Follow-up meetings according to the planned schedule</p> <p>Have regular meetings with the audience, in this case sales agents and promoters to listen to their</p>	<b>RH/SALES</b>	<b>HR MANAGER</b>	<p><i>Effort level in days</i></p> <p><b><i>RH/S- 1month</i></b></p> <p><b><i>Sales – 1month</i></b></p> <hr/> <p><b>30 days</b></p> <p><b>Initial Date:</b></p> <p>January 2022</p>



Task	Development	Responsible	Feedback	Dates
2.2 Chose evaluating methods that measure the sales training goals and objectives	<p>perceptions and contributions</p> <p>Use key documents and examples of the literature review for the blended training content design</p> <p>(If possible)Have regular meetings with experts on learning development and sales training for consulting</p>			<p><b>Termination Date:</b></p> <p>January 2022</p> <p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>The goals and objectives of the blended sales training and their measurements</li> <li>First draft of the blended strategy for the in-person and e-learning sales training</li> </ul>

### 3. Development

#### (Task Resume)

3.1Development content, materials, and activities. Devise the general strategy: description of the blended sales training, goals and objectives, mission, and vision

Develop the workplan schedule in coordination with the audience and involved departments.

Devise the criterion to select your audience, define the methodology to be used, and define clear roles and responsibilities all the stakeholders

Workplan implementation and monitoring results in

Recurrent meetings with HR and Sales

Obtain additional feedback or insights from the target audience to know their opinion about the training in real time

Use key documents and resources from the literature review to develop the curricula

Obtain additional insights from the sales managers, sales director, CEO, or other

RH/SALES

HR MANAGER

*Effort level in days:*

*RH- 1 month*

*Sales- 1 month*

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*30 days*

**Initial Date:**

February 2022

**Termination Date:**

March 2022

**Deliverables:**

- Workplan schedule
- In-person sales training curricula for pilot
- Online sales training curricula for pilot

Task	Development	Responsible	Feedback	Dates
evaluations and follow-up plan implementation	experts in sales training			
3.2 Revise and improve the activities in the curricula based on the results, comments, and observations of the audience in prior meetings	Design and develop content based on the feedback, comments, and observations of the target audience in previous meetings			
3.3 Finalize the contents of the curricula for sales training and coordinate agendas with all the stakeholders to define a schedule for interventions	Training for facilitators and instructional designers is crucial for the development of an optimal curricula			
3.4 Practice continuous improvement in the development of the curricula with special attention on practical activities and their processes of evaluation	Create a routine debriefing with the HR Resources Developers			

#### 4. Implementation

##### (Task Resume)

4.1 For the online training plan 3 sessions for introduction, to learn how to use and interact in the Google Classroom Platform. For the in-person training present the schedule of activities and workplan

On-going meetings with the departments involved  
Additional inputs from the target audience as required  
Conduct Pre-training and post training evaluations

RH/SALES

HR MANAGER

*Effort level in days:*

*RH- 1 month*

*Sales- 1 month*

---

*30 days*

**Initial Date:**

April 2022

**Termination Date:**

May 2022

**Deliverables:**

4.2 Coordinate logistics with facilitators and sales managers before launching the pilot trainings to obtain their approval before uploading/presenting the

Routine debriefs with internal facilitators

Task	Development	Responsible	Feedback	Dates
definitive content of the blended sales training				<ul style="list-style-type: none"> <li>Sales training logistics plan for implementation</li> </ul>
4.3 Implement the pilots (online and in-person) sales trainings				<ul style="list-style-type: none"> <li>Learning Management Systems reports evaluation and certification</li> </ul>
4.4 Monitor and evaluate the participants performance throughout the pilot trainings. Provide support and mentoring to assure the fulfilment of the activities and also receive feedback for continuous improvement				

## 5. Evaluation

### (Task Resume)

5.1 Document the participants reactions for initial reports. Determine the content to be evaluated and the methods to measure performance. Devise a communication plan to inform participants about the evaluation process

5.2 Identify lessons learned in the pilots to adjust the training curricula. In order to adapt to the need necessities of the participants and the company's goals and objectives

Meeting with sales managers and HR to determine an evaluation method, discuss the results of the pilots, decide how to communicate the results, and finally plan the logistics for the certification awards

Have a final meeting to identify improvements and

RH/SALES

HR MANAGER

*Effort level in days:*

***RH- 15 days***

***Sales- 15 days***

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***15 days***

**Initial Date:**

May 2022

**Termination Date:**

15 May 2022

**Deliverables:**

- Results from the pilot training curricula

**Task****Development****Responsible****Feedback****Dates**

adjust the curricula for  
the new training

- The evaluation documents
- Communication plan and the proposal of a Certificate

## List of Contacts

Cuadernos Estrella Contact List				
Title	Department	E-mail	Phone Number	Consent Signature
CEO	Direction	<a href="mailto:armando.neira@estrella.org.mx">armando.neira@estrella.org.mx</a>	52(722)2620290	
Human Resource Manager	Human Resources	<a href="mailto:myriam.gutierrez@estrella.org.mx">myriam.gutierrez@estrella.org.mx</a>	52(722)2620290	
Sales General Manager	Sales	<a href="mailto:tulio.munoz@cuadernos estrella.com">tulio.munoz@cuadernos estrella.com</a>	52(722)2620290	

## Glossary of Acronyms

<b>HR</b>	HR Resources
<b>HRD</b>	HR Resources Developer
<b>ATD</b>	Association for Talent Development
<b>CITI</b>	Collaborative Institutional Training Initiative
<b>ADDIE Model</b>	Analyze, Design, Develop, Implement and Evaluate
<b>ICT</b>	Information and Communication Technologies
<b>CRM</b>	Customer Relationship Management

<b>SFA</b>	Salesforce Automation
<b>LMS</b>	Learning Management Systems
<b>AIIM</b>	Association for Intelligent Information Management
<b>ROI</b>	Return of Investment
<b>MALS</b>	Master of Arts in Liberal Studies

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