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Performance Improvement of Sales Training Feedback System

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## **The Problem**

### **Problem statement**

The sales training department is tasked with preparing representatives to (1) deliver outstanding customer service and (2) adapt to updates and modifications in the business with minimal disruption of customer service, but the sales department trainers are dissatisfied with the system for obtaining feedback from training program participants, so the data about the quality and effectiveness of training are not being used to improve existing programs or to keep up with changing business needs.

### **Context of the problem**

The problem takes place in a large pharmaceutical training department, which services several therapeutic businesses by providing “product, disease state, selling skills, and leadership development training each year.” In all, the department trains nearly 3000 sale representatives who are based in the United States and account for nearly “\$2 billion in revenue for the global corporation.” Training programs given include “computer-based training modules, meetings, experienced-based learning, and live face-to-face training” (Symonette, 2015, p. 19). The problem associated with feedback after training sessions is a company-wide problem for two reasons. First, problems with training affect all aspects of the company, since training is a company-wide endeavor. Second, what seems to be a training issue is, at heart, a problem deeply embedded within the organizational culture.

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### **The characters**

The directors of the training department for the large pharmaceutical company saw a problem with a lack of feedback from learners after training, so they initiated a feedback system by hiring an internal performance consultant. The consultant contracted an outside vendor to create the training feedback system. The organization's Global Training and Development Council (GTDC) gave direction to the outside vendor and implemented the training feedback program. Recipients of the training, the learners, were the 2,970 sales representatives in the United States. Other constituents involved in the process were the sales trainers, the sales training directors, along with other departments outside of the training department (including Information Technology), local leadership, and facilitator stakeholders who are meant to receive the feedback and make recommendations for improvements (p. 18-20).

### **The Issues**

The feedback system does not yield valuable and actionable data due to generic questions designed to be relevant, company-wide, but missing the mark, locally (Symonette, 2015, p. 20-21). Because the feedback is not useful to local leadership and the procedures associated with receiving feedback are bureaucratic and inflexible, individual departments have disengaged from the process. The training department has problems, too. Trainers do not receive timely feedback about their performance in sales training and no system exists to track feedback data over time. Trainers have attempted to obtain data more quickly, but sometimes this has resulted in participants completing two surveys, which undermines the preferred centralized process. In addition, the trainers have no incentive to improve and grow to meet the needs of participants

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because they are only accountable for the quantity of personnel trained, rather than being evaluated on the quality and value of the training. The lack of feedback about the quality of training only serves to reinforce this lack of ownership by the trainers (Symonette, 2012, p. 20-.22).

The flow of feedback is affected by many other dysfunctions as well. Barriers to improving the feedback system are encouraged by a divisive corporate culture. Competing priorities between internal businesses result in decreased motivation for departments to work together. There is a lack of sharing of information to improve programs, and any calls for finding consensus among the various departments are seen as attempts to force conformity. This negative attitude toward collaboration promotes a “culture of silos” (Symonette, 2012, p. 22). On the other hand, the organization emphasizes centralized, company-wide goals at the expense of local needs and by allows the group responsible for design and implementation, the Global Training Development Council (GTDC), to work against customizing and localizing the feedback system. GTDC tends “to side with a more centralized business approach for local needs and changes in business” and the only option for customization of reports is not feasible since the GTDC charges at a premium rate for any changes (p. 20). The training department also struggles with implementation of the feedback system because of high trainer turnover, especially since there is a learning curve with the system. In general, goals are not tied to feedback, and there is no system in place to communicate progress, or lack of progress. With a budget freeze underway, funding for any kind of change is an issue. All of these problems are compounded by the lack of a growth mindset at all levels of the company, especially within the training department (p. 23).

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Despite the significantly negative situation depicted in the case study, there are some opportunities to negotiate, in order to move in a positive direction, without additional budgetary outlay. Allowing the customization of reports, which could create a sense of autonomy for local businesses and really pull them into the process, can increase environmental support in the organization. Currently, budgetary issues and the high cost to produce these reports make this impossible. However, since the provider for these reports is the GTDC, a group within the company, costs should be negotiable, for the good of the company. Providing the changes, at cost, should be done without question, especially during this time of budgetary difficulties. One department helping another could be a real boost to the sense of teamwork, company-wide.

In the same respect, customizing feedback questions to match specific training sessions and to the departments being trained is expensive and difficult due to the centralized, bureaucratic approach for approving changes. This unyielding approach results in very generic questions that seem irrelevant to participants. So, data collection can be made more functional by streamlining the process for changing and getting approval of locally relevant questions (p. 21). Finally, sales training leaders are not getting performance feedback, resulting in a lack of ownership over the process. It is important to allow constructive feedback to trainers to result from each training session.

Some negative concerns can be reframed as positives. First, though the case study cites a lack of ownership by the trainers, trainers have attempted to obtain feedback after training sessions to the point of creating their own surveys written to meet their needs and to be returned to them quickly. This extra effort on their part indicates that they make not be as disengaged

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from the improvement process as it first appears. Second, company culture emphasizes centralized, even bureaucratic, processes that limit and slow the opportunities for change and prevent changes that could meet local needs. However, this system demonstrates a commitment to company-wide unity. Since unity is a big problem, it is helpful that the values for unity may already be figured into the system.

### **The Facts**

In the initial reading, the most obvious problems had to do with the feedback system—it just is not working. Upon closer inspection, the problems run much deeper. The greatest concern is the lack environmental support in general, as well as a lack of motivation by individuals and departments to cooperate; there is a dearth of teamwork and unity in this corporate culture (Van Tiem et al, 2012, P. 168). Between the “culture of silos,” the competing priorities among departments, the backlash against working toward consensus, and the GTDC price-gouging the training department when they could be helping to improve the very system they are tasked with implementing, this company seems to be divided against itself in an alarming way. A key fact is that no one has identified the organizational culture as the main problem. Concerns have been raised over the budget, the lack of ownership among the trainers, the difficulty in making needed changes, and the duplication of surveys, but alarm should be raised over the competitive, divisive behavior that is broadly and regularly tolerated.

Some issues are unclear in the case study. First, what are the directions of the organization (the stated vision, mission, values and goals)? Also, while the training department sees the problem—and has asked for help— is there motivation to change in the company

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leadership? Do others, outside of the training department see the problems with the lack of feedback? What is the perception of the sales representatives toward training class attendance and toward the training department? Are the sales representatives interested in giving feedback and improving the training courses? Why does it take a long time for the trainers to get the little feedback there is? What is at the root cause of the competition-over-teamwork attitude that seems so pervasive?

### **The Feelings**

After reading the case study, I felt confused. There are so many overlapping problems that it seems overwhelming. Once I sorted out all of the players and the issues, the problem of the contentious corporate culture emerged as the most important problem to be addressed, but I did not feel very hopeful. Division, competition, and self-interest are deeply rooted in the company culture. I would not want to work for this company. As I studied the case more closely, I was intrigued. From an appreciative inquiry perspective, this situation is filled with “performance improvement opportunities” (Van Tiem, et al, 2012, p. 155). As a designer, there is a great opportunity to make a significant difference here; it would be very interesting to complete a through performance analysis to pinpoint the full range of issues.

### **The Angles**

Looking at the problem from the viewpoint of the various stakeholders is helpful. For instance, the central mission of the sales department is to prepare the sales representative to “provide exceptional customer experiences and to adjust to changes in the business with minimal

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customer disruption” (Symonette, 2012, p. 19). Ironically, the training department, which was tasked with implementing these two important duties, is unable to do this themselves—the training department is unable to receive valid and timely feedback to improve service to their own customers, and they are unable to implement the feedback system because the organization can not adapt to the changes required to do so. Van Tiem calls this “speaking with two voices” and explains that this provides a *disincentive* to employees to adapt changes and to seek growth, rather than an incentive to do so (2012, p. 170). Another disincentive to improvement is the fact that trainers are rewarded by quantity, not quality of the service they provided; and this circumstance does not line up with the central mission to teach excellent customer service (Symonette, 2015, p. 22). From the viewpoint of the learners, sale representatives, the trainers are terrible role models. From the viewpoint of the trainers, they are set up to struggle in their jobs. Training leadership, committed to improvement, were frustrated from the beginning and are now disappointed that the solution does not work, but their hands are tied. The internal performance consultant must have been so discouraged to come up against great resistance and to learn that the organizational culture, the whole system, did not support the changes he was tasked with implementing.

From the standpoint of the feuding departments, including the GDTC, they have been oppositional and contentious from the start, and when they saw changes coming, they doubled down on resistance. This seems really incredible that they would be so antagonistic towards their own company, considering that money has been spent to improve the feedback system in a time of budget shortcuts. On the other hand, it seems that management is supportive of holding to the centralized way of working, even if it isn't working. This doesn't make any sense, unless they



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are far removed from the problems or they are not incentivized and motivated toward growth either. Again, I am left thinking that this would be a dreadful place to work—except for the IT department, which encouraged its employees to think outside the box. The ingenuity of the IT group trickled out and found other innovators. Likely these people were desperately thirsty for growth and encouragement. This initiative and the remarkable response (innovation occurring in such a negative place) is the major bright spot in the case study. The other positive factor is the continued drive of the training leadership to fix the problems. Given the hopeless environment, their determination is significant.

### **The Resources**

The pharmaceutical company already has many assets available to it, including a training department that is capable of delivering “computer-based training modules, meetings, experience-based learning and live face-to-face training” (with some trainers who are invested enough to write and administer their own surveys in order to get timely feedback on their performance) (Symonette, 2015, pp. 19 & 22). The training leadership team sees that they play a crucial role in the process, but wants help identifying their role in the necessary changes (p. 22). Other assets include the internal performance consultant who is at work, trying to meet the needs of the local departments; a feedback system that grounded in theory, but practical, and is already paid for; and the IT initiative that “fostered a collaborative and cross-functional approach” to new technology—this bright spot could serve as a model. In addition, the IT collaborations empowered innovators among the employees to take initiative in introducing new ideas into the work environment (p. 23). Another asset, from an appreciative inquiry perspective, is the fact that the company is compared to a bureaucracy. While some characteristics of this sort of

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administration are negative, appreciative inquiry urges us to find the good (Van Tiem, et al, 2012, p. 155). With that in mind, positive characteristics of a business operating with a bureaucratic model include a well organized, hierarchical form of governance that values and promotes the common good of its constituents; this sort of system can institute across-the-board changes when needed (Goodsell, 1994, p. 27). On a lower level, the group known as the GTDC is acting as a barrier to change but could become an asset. If this group can relax its strict policies against “customizing and localizing the feedback system,” it can play a pivotal role in improving both the feedback system and the corporate culture (Symonette, 2015, p. 20). Currently, the GTDC charges a premium for customized reports and blocks the customization of feedback questions after training (p. 20). These actions add to the divisive culture in the organization. Exhibiting generosity and flexibility for the greater good would help fix some flaws in the feedback system, but also set an example of team-oriented behavior that is badly needed in this situation.

### **The Recommendation**

The initial analysis by the internal performance consultant determined that changes needed to be made in the feedback system to create a more “user-friendly, self-serviceable, actionable and real-time feedback system” (Van Tiem at al, 2012, p. 19). The new system relied on the work of Kluger and Denisi and of Hysong, Best, and Pugh, which called for “timeliness, individualization, non-punitive, and customization” components that were (unfortunately) not supported by the organizational environment (p. 19-20). Van Tiem, et al, cite Gilbert in explaining what environmental performance support should include: (1) information (data, information, and feedback); (2) instrumentation (environment support, resources, tools); (3)

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motivation (consequences, incentives, rewards) (2012, p. 168). Though there was a tool, the feedback system, the information/data/feedback from it were not being consistently shared in a timely manner with the people who needed it.

This case study reveals a need for a thorough performance analysis. Since this company works in a centralized, bureaucratic way, important company-wide programs require buy-in from all levels of the company, but especially from the executives. A top-down directive is needed to get the ball rolling. In addition, innovators, early adopters, and “influential opinion leaders” should be identified because they can be of great assistance in creating positive feelings towards changes (Van Tiem, et al, 2012, p. 71; Dirksen, 2012, p. 225). Any goals must be both feasible and attainable, taking into consideration the currently tight budget (Van Tiem, et al, 2012, p. 156). However, nothing short of a complete performance analysis will suffice. According to Van Tiem et al, “without first identifying and clarifying the problem or performance gap it is unsound and certainly unsystematic to state the cause and select or design a solution” (2012, p 123). Dirksen concurs, “If you have a well-defined problem, you can design much better learning solutions. It’s always worth clearly defining the problem before trying to define the solution” (2012, p. 26). That being said, this case study gives some information, so for the sake of this paper, some assumptions can be made that there is an organizational gap—but further analysis could reveal how the strategy and structure do (or do not) line up with the climate and the practices (p.137). The organizational analysis will also likely show discrepancies with the systems, methods, organizational results, and the motivation and feedback (pp. 138-139). In terms of an environmental analysis, the brief overview from the case study reveals problems with the workplace environment (with resources, information, and the policies and procedures stacked

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against continuous improvement and a sense of community and teamwork); the work (job design and work flow in not allowing for feedback for trainers or cooperation between departments); the worker (motivation is sorely affected by the limited capacity to get work done in the training department and elsewhere due to the “culture of silos”) (pp. 152-153).

Once the results of the more thorough environmental and organizational analyses identify the gaps, further analysis will reveal the root causes, and interventions can be planned. Since cost is a factor, low-cost methods of change can be employed. Dirksen explains that “social proof,” which harnesses the power of social influence (turning to or citing people who are respected or who are seen as advisors, regardless of their actual position) can be an effective way to promote change and get many stakeholders on board. She suggests identifying the influencers with positive opinions and using them in the following ways: (1) “engage opinion leaders first” (2) “have people describe successes with the process, procedure, or skill” (3) “make progress visible” (2012, pp. 225-226). Another method to motivate for change is by modeling and practice to demonstrate the relative advantages of these behaviors. If the training department and the GTDC can break down barriers and work together for the common good, that could begin to turn the tide on the negative climate (Dirksen, 2012, pp. 219, 222-223). Finally, perhaps monetary and non-monetary incentives, and career development opportunities can be worked into the interventions to increase motivation (Van Tiem, et al, 2012, p. 168).

### **The Lessons Learned**

This case study demonstrates that the cause analysis is critical to performance improvement. If the internal performance consultant continues to try to solve problems only by

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working on the training feedback system, he will have missed the most important problem and opportunity—the toxic workplace environment. The feedback system cannot be fixed anyway, not as long as the environment fails to support cooperation and teamwork among individuals and departments. What Van Tiem, et al calls an environmental gap in the organization, Dirksen would identify as a motivation and/or attitude gap for the learner, but clearly the environment can have a negative effect on the most motivated learner, if it is set against change and growth. Dirksen asks this about motivation: “What’s the learner’s attitude toward the change? Are they going to be resistant toward changing course?” (2012, p. 20). In the case study, the motivation and attitude problems are at the department level with some departments, like the GTDC, resisting change and refusing to adopt the implementation plan created by the internal performance consultant. At the organizational level, centralized business goals are emphasized at the expense of local business needs, creating a barrier that prevents “the feedback system from being improved and taking root in the sales training department” (Symonette, 2015, p. 20). It was interesting to see that the problems that individuals have are similar to the problems organizations have.

In the case study, it seems that the performance consultant created a solution to a problem, but it wasn’t the main problem. Doing a thorough performance should have pointed to the larger problems. Dick, Carey, and Carey agree with earlier quotes by Dirksen and Van Tiem, et al, in saying that “the purpose of a performance analysis study...is to acquire information to verify problems and identify solutions.” They elaborate, “The outcome of a performance analysis is a clear description of a problem in terms of failure to achieve desired organizational results and the corresponding desired and actual employee performance, evidence of the causes of the

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problems and suggested cost-effective solutions” (Dick, Carey, & Carey, 2015, p. 21). The main lesson here is that a complete analysis must be done to find the root causes of problems.

When I was a new dental hygienist, I worked in an office that was full of other women and one man, the doctor. The environment of this office was toxic. There were two bullies out of the five other female staffers and the doctor refused to confront the situation. These two bullies didn't work together, but both set a very negative tone in the office, by harassing and criticizing other employees. If a performance analysis had been done, the results would have shown that the values and goals of the doctor were not being carried out in the environment. He was the smartest person I ever worked for and really funny and patient. He was my favorite boss, except that he did not provide an emotionally safe environment where I could grow and thrive. The bullies usually shot down any new ideas that I suggested; and they highlighted any mistake I made (like running late or needing help because I was fairly inexperienced). I stayed at that job for 18 months, but I would have gladly stayed there much longer if the circumstances were different. At the time, I thought, *if only Tracy would quit and Karen would retire, then it could be really nice around here*. Looking back now, knowing what I have learned in life and in these classes, I don't think it would have gotten better if those two had left. The problem wasn't simply with the employees, but with the system (and the boss) that allowed them to act that way.

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