

## Sales Training Evaluation: An Integrated Framework and Research Agenda

By Ashraf M. Attia, Earl D. Honeycutt, Jr., and Rana Fakhr

A significant gap exists in the understanding of sales managers regarding the evaluation of sales training. This problem is compounded by the absence of an integrated framework that synthesizes and explains the multiple evaluation levels firms can employ to assess sales training programs. An initial step in moving toward a global sales training evaluation model is to offer such a framework. To this end, we present a model that integrates existing research across myriad disciplines and demonstrates opportunities to evaluate sales training at multiple levels. This article also offers research propositions that further advance sales training evaluation theory and provides practical implications for the sales management community.

### INTRODUCTION

Sales management literature in business-to-business, consumer, and service industries documents the importance of sales training (Jantan and Honeycutt 2013; Attia et al. 2008; Honeycutt, Mottner, and Ahmed 2005). This is because sales training significantly contributes to individual salesperson knowledge and skill levels, higher performance and effectiveness (e.g. Cron et al. 2005), and overall firm performance (Attia et al. 2005; Pelham 2002).

Companies invest significant amounts of time and money training their sales team in order to increase worker productivity and firm profitability. This investment was estimated at \$59.7 billion in the 2011 *Training Industry Report* ("2011 Training Industry Report," 2011). Previous studies have approximated that 25 percent or nearly \$15 billion of total annual training expenditures are invested in sales training (Wilson et al. 2002). Also, one-third of companies expend more than \$2,500 per

year training their sales reps because they believe that the greater the sales training investment, the more the sales team achieves their sales quota ("Sales Training Investment," 2008). Lastly, individual training costs can exceed \$100,000 for high-tech fields (Dubinsky 1999) and total training costs increase significantly when foregone sales revenues are considered (Attia and Honeycutt 2000).

Given the scope of effort and expense devoted to sales training, it is not possible to know whether a sales training program is effective until evaluation occurs and the value of the training program is shown to exceed training costs (Honeycutt 1996). However, evaluation problems are a more universal human resource issue:

"Evaluation of interventions is among the most critical issues faced by the field of human resource development (HRD) today.... The lack of research to further develop a theory of evaluation is a glaring shortcoming for human resource development" (Holton 1996, P. 5).

The purpose of this article is to fill a significant gap in the sales training evaluation literature. The article achieves this purpose by: (1) integrating existing training program assessment models to create a sales training evaluation framework; (2) proposing a comprehensive framework that explains how to objectively assess sales training effectiveness; and (3) proffering a research agenda, in the form of seven research propositions, to analyze the relationships and correlations that exist among the framework's various evaluation levels. The paper concludes by offering practical actions sales managers can undertake to assess their training programs.

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## SALES TRAINING EVALUATION MODELS

In the mid-1950s, managers and trainers recognized the importance of training assessment but they were not sure how to accomplish the procedure (Randall 1975). In an effort to address this knowledge gap, Kirkpatrick (1959a, 1959b, 1960a, 1960b) proposed a model that encompassed four training evaluation levels: reaction, learning, behavior, and results. These four evaluation levels are listed in order from the least to the most difficult to accomplish (Honeycutt and Stevenson 1989) and least to most important in regard to effectiveness (Attia, Honeycutt, and Leach 2005). These four levels have been described as "...different operationalizations of training effectiveness" (Winfred et al. 2003, P. 235).

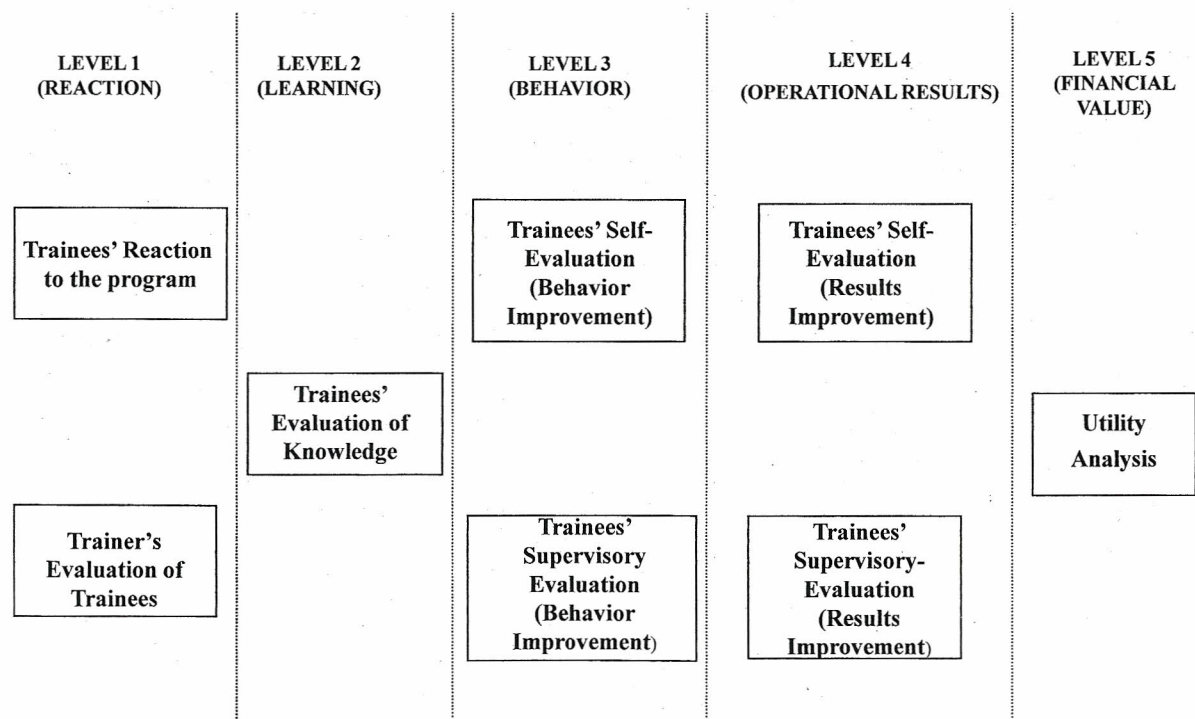
After five decades the Kirkpatrick model remains the accepted framework for evaluating sales training. While a handful of sales training articles attempted to extend Kirkpatrick's model, few offer instructions for empirically conducting an objective sales training

program evaluation (e.g. Honeycutt et al. 2001). Our article expands the work of Kirkpatrick (1959a, 1959b, 1960a, 1960b) and Honeycutt et al. (2001) by developing a framework for evaluating sales training effectiveness. This proposed framework employs five levels--the four levels proposed by Kirkpatrick and the fifth level (utility analysis) proposed by Honeycutt et al. We discuss below how each level affects one another and the relationship of constructs in the framework.

## A COMPREHENSIVE FRAMEWORK FOR EVALUATING SALES TRAINING

Since minimal empirical research has been published about sales training evaluation, a comprehensive framework that depicts and explains the sales training process would be extremely valuable for sales managers. Such a framework would more precisely formulate sales training evaluation, help clarify evaluation thought, integrate sales training evaluation concepts, levels, and methods, and establish priorities for future research.

Figure 1: Framework for Evaluating Sales Training Programs





In Figure 1 we offer a framework for evaluating sales training effectiveness that consists of five levels: reaction, learning, behavior, operational results, and financial value. Also in Table 1 we detail how each sales training evaluation level and method relates to the time period of the evaluation--before, during, and after the training program.

**Table 1: Sales Training Evaluation Levels, Methods, and Time Period**

Levels	Before Training	During Training	After Training
Level 1 (Reaction)		-Evaluating Trainee Reaction - Trainer Reaction	-Evaluating Trainee Reaction - Trainer Reaction
Level 2 (Learning)	-Evaluating Trainee Learning (Pre-Test: Standardized or tailored test)	- Evaluating Trainee Learning (for role playing or learner's evaluation)	- Evaluating Trainee Learning (for learner's evaluation)  - Evaluating Trainee Learning (Post-Test: Standardized or tailored test)
Level 3 (Behavior)	- Trainee Self-Evaluation (Behavior Improvement) - Trainee Supervisory-Evaluation (Behavior Improvement)		Trainee Self-Evaluation (Behavior Improvement) - Trainee Supervisory-Evaluation (Behavior Improvement)
Level 4 (Operational Results)	- Trainee Self-Evaluation (Operational Results Improvement) -Trainee Supervisory-Evaluation (Operational Results Improvement)		- Trainee Self-Evaluation (Operational Results Improvement) - Trainee Supervisory-Evaluation (Operational Results Improvement)
Level 5 (Financial Value)			Utility Analysis (relying on Levels 3 and 4 before and after training scores)

### Interactive Evaluative Levels

Sales training evaluation is the systematic collection of information necessary to determine the effectiveness of sales training activities and the outcomes of those actions (Honeycutt 1996). The proposed framework offers an objective guide to understanding the measurement of training effectiveness at five distinct levels. The framework also incorporates key components of evaluative measurement, while maintaining flexibility to select the optimum combination of training tools to assess effectiveness and ensure consistency across various levels.

Sales managers and firms have at their disposal myriad combinations of five different measurement levels to insure their training programs are effective. However, one study found that the percentage of companies that assess each evaluation level was: reaction 78%, learning 32%, behavior change 9%, and results (operational results) or utility analysis (ROI or financial value) 7% (Tyler 2002). Given the capabilities of each level, Table 2 offers specific measures that can be utilized in each sales training evaluation level. A brief discussion of the five distinct evaluative outcomes is provided to clarify the process and guide managers toward improved program development, implementation, and evaluation success.

**Table 2: Measures for Sales Training Evaluation Levels**

<b>Levels</b>	<b>Suggested/Most Frequently Used Measures</b>
<b>Level 1 (Reaction)</b>	<p><i>Measures for assessing trainee reaction:</i> trainer effectiveness (knowledge of subject matter, preparation, communication, and experience), training topics (interesting, helpful, and beneficial), training materials (relevance, practicality, and presentation method), training aids (appropriateness, currency, and effectiveness), training schedule (time, length of program, sequence, and breaks), training services (quality and quantity of food), training facilities (location, comfort, and convenience), training techniques, relationships with trainer and other program participants, and usefulness and utility of the sales training program.</p> <p><i>Measures for trainer's reaction:</i> trainee interest in the program, participation level, attendance, dedication, and relationship with the trainer and other program participants</p>
<b>Level 2 (Learning)</b>	<p><i>Measures for assessing trainee learning:</i> 1) For written tests (pre and post test scores), standardized or tailored tests need to be designed based upon the training program knowledge content.</p> <p>2) For the learner's evaluation method, the learner or the trainee will be asked to think about what has been taught such as asking "in terms of its usefulness to me, I give this session (or training topic) a value rating of....;" it measures the value-added and improvements in knowledge, skills and job performance). In this method, the training sessions or topics would be different from one training program to the other. So they need to be identified by the evaluator.</p> <p>3) The role-playing method will be used during or at the end of the sales training program. Measures set by the evaluators.</p>
<b>Level 3 (Behavior)</b>	<p><i>Measures for assessing trainee behavior:</i> Selling and behavioral skills, including, relationship variables (relationship with supervisors, customers, key accounts, peers, and subordinates), listening skills, teamwork, team spirit, initiation, creativity, innovation, credibility, maturity and bearing responsibilities, willingness to accept criticism and feedback, negotiation, handling objections, efficiency in closing, time management, and planning of sales routing.</p>
<b>Level 4 (Operational Results)</b>	<p><i>Measure for assessing results attributable to training:</i> Operational results measures are classified into eight categories: sales measures, market share per quota, account measures (number of new accounts on which payment is overdue), profit measures (net profit dollars, return on investment, and net profit as a percentage of sales), orders (order-call ratio), calls per period (day/week/month) on existing accounts or prospects, selling expenses (selling expenses to sales or to quota), and ancillary activities (number of required reports turned in, number of customer complaints, and number of letters/phone calls to prospects).</p>
<b>Level 5 (Financial Value)</b>	<p><i>Measures for assessing financial value:</i> Cost-Benefit Utility Analysis.</p>



### **Level 1: Reaction**

Reaction is how trainees perceive, and feel about, a specific training module or program (Kirkpatrick 1996). Empirical sales and human resource management research confirms that trainee reaction is the most frequently measured evaluation level (Tyler 2002; Morgan and Casper 2000). In fact, in many organizations reaction is the primary or only means of training evaluation, because it is a parsimonious measure—in terms of time and money (Honeycutt and Stevenson 1989). However, assessing how a sales trainee “feels” about a training program does little to document their knowledge, usage, or the effectiveness of the training being transferred. To properly interpret reaction scores sales managers must establish standards, guidelines, and criteria regarding how trainee feedback will be utilized (Lupton et al. 1999). Empirical evidence suggests that reaction feedback alone is of limited value to sales managers (Attia, Honeycutt, and Leach 2005; Morgan and Casper 2000).

### **Level 2: Learning**

Knowledge is a critical outcome of training that enables salespeople to cope effectively within a dynamic and competitive environment (Weitz et al. 1986). A salesperson's knowledge—principles, facts, and techniques—can be evaluated before, during, or at the end of the training program using different methods, including tests and assessments of value added knowledge (Currie 1990). Successful learning is a prime indicator of sales training effectiveness (Chonko et al. 2003) and assessments of learning transfer are the only evaluation level that facilitates organizational objectives. It is preferable to assess knowledge as a change or gain score or as an indicator of knowledge acquired (Leach and Liu 2003; Warr, Allan, and Bird 1999).

### **Level 3: Behavior**

Identifying job behavior that is attributable to sales training is a more complex assessment than reaction and learning levels (Kirkpatrick 1960a; Kirkpatrick 1994).

Abundant conceptual and empirical research document that qualitative measures are employed to assess the behavior of sales professionals (e.g. Erffmeyer and Johnson 2002; Pelham 2002). Table 2 lists important

measures for assessing trainee behavior. Empirical studies (Jobber et al. 1993; Ingram et al. 1992; Morris et al. 1991) report that managers perceive that qualitative measures (level 3) provide greater insight about training effectiveness than existing quantitative measures (level 4). Managers believe that behavioral or qualitative variables provide useful information because specific behavior leads to salesperson success (Morris et al. 1994). When providing training, one study reported that trainees who watch a “modeling” video learn by observing correct behavior (Bashaw, Ingram, and Keillor 2002). Sales managers can enhance trainee behavior assessments by employing a rating sheet that lists the desired behavior with anchored descriptors (Attia and Honeycutt 2012).

### **Level 4: Operational Results**

Measuring organizational results attributable to sales training is the most complex and difficult evaluation level to assess (Honeycutt 1996). Said differently, it is difficult to control extraneous variables so that organizational success can be solely attributed to a new training program. That is, an improvement in sales may be dependent upon extraneous issues, including a successful advertising campaign, a price decrease, the demise of a key market competitor, or irregular weather conditions.

Experts often advocate objective measures of training program effectiveness, such as sales per trainee or sales to quota per trainee (Phillips 1991). Obtaining objective measures is administratively difficult when sales territories vary or data are irregular and/or seasonal. For this reason, managers may resort to qualitative measures to assess the impact of training (Attia et al. 2002). However, three successful evaluations of sales training results were conducted by matching locations and evaluating performance between the trained and untrained sites. Empirical results confirm that trained locations experienced higher sales than did locations that did not receive training (Meyer and Raich 1983; Doyle and Cook 1984; Cavusgil 1990).

### **Level 5: Financial Value**

A powerful method of expressing the financial outcomes of personnel actions, including training programs, in terms of dollars is utility or cost-benefit analysis. From an economic perspective, a firm's management expects



trainers to prove the utility of their training programs (Becker 1989) by confirming that training benefits exceed training costs. In addition, sales training must be cost effective (Anderson 1993), profitable, and worth the investment (Phillips 1991). Conducting utility analysis can also help firms better understand salesperson failure (Dubinsky 1999). In a case study of a global firm's training program, utility analysis showed that every \$1 spent on sales training generated \$2.63 in revenue and \$1.63 in profit (Honeycutt et al. 2001).

### THE NEED TO EXAMINE RELATIONSHIPS AMONG EVALUATION LEVELS: RESEARCH PROPOSITIONS

Sales training and related literature provide a basis for explaining the five assessment levels that exist within the sales training evaluation framework that managers can utilize to assess training program effectiveness. Figure 1 shows the evaluative framework with the five assessment levels. Next, propositions are presented in a manner so that testable hypotheses can be derived to direct future research efforts. The elements and propositions discussed were selected on the basis of existing research and logical evidence to construct the comprehensive framework.

#### Propositions That Examine the Sequential Relationships among the Five Levels

Positive qualitative and quantitative reaction scores indicate a trainee's receptiveness to learn. Knowledge transfer includes individual learned skills and attitudes that affect job behavior, which contribute to positive individual and organizational level results. Favorable results generate positive financial returns and increased customer satisfaction. Consequently, we propose that a positive relationship exists between reaction, learning, behavior, and performance levels (Chonko et al. 2003). To verify these relationships, three research propositions are presented to test the effect of one construct on the other.

#### *The Effect of Trainee Reaction on Learning, Behavior, and Results:*

Reaction focuses on measuring the attitudes and feelings of sales trainees about the training program (Honeycutt and Stevenson 1989). It is important to obtain positive trainee reaction since the more favorable reaction is to

the training environment the more likely the trainees are to be receptive to learn the principles, facts, and techniques that are presented (Kirkpatrick 1959b). Said differently, positive reaction scores imply that trainees were not distracted by environmental conditions or pedagogical approaches.

Several psychology studies examined correlations among the four evaluation training levels (Alliger et al. 1997; Alliger and Janek 1989). The findings document little systematic relationship between traditional participant reactions and other levels of training evaluation criteria (Morgan and Casper 2000), which led Holton (1996) to question the feasibility of Level 1 serving as a major sales training evaluation criterion. The weak relationships between trainee reaction, and other criteria, can be partially explained by the diverse content of trainee reaction instruments and measures, which differ among disciplines. Likewise, the findings illustrate the importance of comprehending the dimensionality of variables (Morgan and Casper 2000) whenever measuring trainee reaction.

In Level 1, Alliger et al. (1997) distinguished between *affective judgment* or the measure of how the trainees like or are satisfied by different training program dimensions and *utility judgment* or how useful the trainee finds the training program or the extent to which the trainees can apply the content to the job. The studies reported the existence of significant relationships between utility and affective judgments (Level 1), as well as learning (Level 2) and behavior (Level 3). In a personnel management study, trainee reactions were strongly related to learning outcomes (Clement 1982). Kirkpatrick (1959a) stated that positive reaction scores provide an indication of satisfaction that intuitively facilitates trainee learning, behavior, and results. Consequently, the first research proposition is presented:

*Proposition 1: Trainee affective and utility judgment reactions positively affect trainee learning, behavior, and results.*

#### *The Effect of Trainee Learning on Trainee Behavior and Results:*

Sales training provides salespeople with an opportunity to acquire requisite skills, knowledge, and attitudes to effectively cope in dynamic and competitive



environments (Weitz et al. 1986). Salesperson learning is also an organizational source of sustainable competitive advantage (Pelham 2002; Kohli et al. 1998). Because training is a systematic process where trainees acquire skills, knowledge, and attitudes that lead to improved behavior and results in the marketplace, salespeople must practice on-the-job what they learned in the sales training program (Goldstein 1993).

Trainee behavior will not change unless learning takes place (Chonko et al. 2003; Kirkpatrick 1994). That is, if training is devoid of learning, managers cannot expect behavioral change. Research confirms that salespeople characterized by a strong learning-orientation are more likely to engage in efforts to enhance job-related understanding (Sujan et al. 1994) and apply that knowledge on the job (Teas et al. 1979), which leads to higher sales performance (Kohli et al. 1998). Senge (1990) emphasized the significant relationship between learning and behavior in the learning organization. Vanderwalle et al. (1999) reported a positive relationship between learning and sales performance. In addition, learning has a positive impact on results and performance (Noe and Schmitt 1986). Significant associations have also been recorded between learning scores and changes in job performance (Warr and Bunce 1995). Therefore, the second research proposition is presented:

*Proposition 2: Trainee learning positively affects trainee behavior and results.*

#### ***The Effect of Trainee Behavior on Results:***

Practicing learned behavior has a positive effect on trainee results (Newstrom 1978). Likewise, Kirkpatrick (1994, 60-61) stated:

"[I]t is important to understand that change in behavior is not an end in itself. Rather, it is a means to an end: the final results that can be achieved if change in behavior occurs. If no change in behavior occurs, then no improved results can occur.... No final results can be expected unless a positive change in behavior occurs."

In order to evaluate salesperson behavior (level 3), five assessment methods are available: customer-evaluation (Lambert et al. 1997; Erffmeyer et al. 1991), self-evaluation, supervisory-evaluation (Tziner

and Falbe 1993; Law 1990), peer-evaluation, and subordinate-evaluation (Erffmeyer et al. 1991). To measure the net effect of training and to ensure that sales training programs yield favorable behavior (level 3) and beneficial results (level 4), academicians recommend an experimental design approach (before and after measures with a control group) (Churchill et al. 2000; Warr et al. 1999; Werner et al. 1994). The rationale is that the behavior and results improvement of experimental group trainees will be significantly higher than those of control group non-trainees for both self- and supervisory-evaluations (Attia and Honeycutt 2012). However, practitioners experience a high level of difficulty employing experimental design.

Research shows that behavior improvement has a significant positive effect on trainee performance and results (Noe and Schmitt 1986). A meta-analysis, and associated causal modeling study, confirmed that a salesperson's attitudes and behavior contribute to his/her sales performance or outcomes (Brown and Peterson 1993). Consistently, behavior improvement, including presentation skills, positively impacts sales performance (Wilson et al. 2002). Thus, the third research proposition is presented:

*Proposition 3: Trainee behavior positively affects trainee results.*

#### **Propositions for Examining Correlations among Various Sales Training Evaluation Methods**

Another dimension of the model shown in Figure 1, is the examination and testing of correlations among the various sales training evaluations performed by the salesperson, the trainer, and the salesperson's supervisor. According to Bolar (1975), all three are valid sales training evaluative sources. Likewise, Mezoff (1987) and Zemke (1996) recommend the use of trainee self-evaluation, as well as that of trainee supervisors, to assess training.

Chonko et al. (1986) reported insignificant correlations between the sales supervisor's assessment and salesperson self-evaluations. That is, trainees tend to rate themselves higher than their supervisors (Connolly 1987). In response, supervisors of both experimental and control group members evaluate subordinates



based upon the criteria employed in self-evaluation. Consequently, two research propositions are presented to measure the correlations between the evaluations performed in levels 3 and 4 by salespeople (trainees and non-trainees) and their supervisors:

*Proposition 4: Trainee and non-trainee self-evaluation of behavior will have insignificant correlation with trainee and non-trainee supervisory-evaluation of behavior:*

*Proposition 5: Trainee and non-trainee self-evaluation of behavior will have insignificant correlation with supervisory-evaluation of trainee and non-trainee behavior:*

Since both sales supervisors and trainers can provide more objective measures than trainees through self-evaluations, non-significant correlations are predicted to exist between the trainer's assessment of trainees and trainee self-evaluations. Consequently, the following research proposition is presented:

*Proposition 6: Trainer evaluation of trainees will have insignificant correlation with trainee reaction, learning, and self-evaluation of behavior and results.*

Conversely, a positive correlation is predicted to exist between trainee evaluations performed by the sales supervisor and the trainer. Therefore, the final research proposition is presented.

*Proposition 7: Trainer evaluation of trainees will have a significant correlation with the supervisory-evaluation of trainee behavior and results.*

In summary, examining and empirically testing these seven propositions will confirm the feasibility of the proposed sales training evaluation model as an integrated framework or system.

#### **IMPLICATIONS FOR THE SALES MANAGEMENT COMMUNITY**

Despite documented difficulties (Attia et al. 2002) and managerial frustrations, sales managers can conduct sales training evaluations by assessing one or more of the five evaluation levels. This review and integration of existing sales training knowledge provides the sales management community with five implications:

**1. Recruit individuals that possess a learning orientation.** Sales managers who hire learning-oriented salespersons greatly increase the probability that trainees will want to learn how to sell more effectively (Wilson, Strutton, and Farris II 2002). This means that who is trained is as important as what is taught.

**2. Teach selling skills first, then product knowledge.** When designing the sales training program, the modules should focus initially on teaching the trainees how to sell as a consultant with special emphasis being placed on listening and problem-solving skills (Pelham 2002). Although trainees may view lectures as "boring" and "ineffective," when combined with discussion and other transfer techniques they can be "robust" (Winfred et al. 2003, P. 243). Once sales trainees learn the sales process, sufficient product knowledge must be provided so that the field salesperson can help customers recognize and satisfy their needs (Wilson, Strutton, and Farris II 2002).

**3. Insure training programs are focused and relevant.** Sales managers should gather reaction-level feedback to minimize distractions that can reduce trainee learning offered in a training module. Reaction instruments utilized by sales managers should focus on two areas: affective and utility. Affective questions assess the trainee's feelings about the program. Most importantly, the trainee should be asked utility questions to insure their perception of the usefulness of the training provided.

**4. Knowledge or learning derived from training is the critical outcome to assess.** That is, unless individual salespersons learn at the appropriate level to apply knowledge to job efforts, training is not successful. Evaluations at this level should measure lower- and higher-level learning skills, knowledge, and attitudes to insure that trainees can apply what they learned in the workplace.

**5. Assess several levels of training effectiveness.** When the sales force correctly employs learned behavior, the likelihood of positive results at the individual and organizational levels increase. A single measure of sales training is unlikely to provide comprehensive insight about what is happening or what has occurred to trainees; however, assessing multiple levels—reaction, knowledge, and sales force behavior—can provide the sales manager with greater insight about the learning that



occurred and the way individual and group behavior is working in the marketplace. Therefore, sales managers should consider reaction scores that focus on affective and utility levels, tests of knowledge transfer, and sales manager evaluations using anchored rating sheets. If firms want to confirm results, higher-level managers in sales and/or human resources can compare level four criteria at trained and un-trained locations or conduct level 5 utility analysis at the corporate level.

### THEORETICAL CONTRIBUTIONS

This effort synthesizes myriad evaluation studies and models to improve the Kirkpatrick model. First, specific evaluation inputs by sales trainers and sales managers have been added. In this way firms gain dyadic information—feedback about how trainees feel and ratings from trainers and/or managers about trainee participation and performance—to assess the training environment. Second a fifth level, derived from utility analysis, was added to the original evaluation model. The new assessment level provides corporate managers, in contrast to sales managers, an ability to compute a detailed cost-benefit analysis of training value that is based upon data derived from levels 3 and 4 of the original model (Honeycutt et al. 2001).

Third, there is a higher probability of measuring organizational results than individual salesperson results that are attributable to sales training intervention, as demonstrated by Meyer and Raich 1983, Doyle and Cook 1984, and Cavusgil 1990. This research also documents that a single measurement of sales revenue or turnover at individual locales may not be the most accurate means of assessing training effectiveness (Rich et al. 1999). Finally, sales managers and upper management should understand that inconsistent ratings are likely when comparing the evaluations of trainees, supervisors, and trainers.

In summary, the model offers sales managers a fundamental understanding of evaluation, to include the relationships between and influences on distinct training levels that allow a more accurate training program assessment. The propositions also provide guidance for future sales management researchers to empirically evaluate sales training programs under both specific and general situations.

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