Experts Informing Experts

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ABSTRACT

Equal attention is placed on the transmitter and receiver roles in even the earliest conceptual models for communication. And yet, the primary emphasis of sales training is on who will deliver the training, what will be trained, how to deliver the training, when to train, and where the training will be delivered. Often absent in sales training is a focus on why the salesperson will adopt the training. A key dynamic in the training environment are the multiple levels of expert status that exist within and between business and academic informing activities as well as in both the informer and receiver roles.

It is common in sales training efforts to have a sales manager or third party expert (consultant) conduct sales training. This paper summarizes findings of a practitioner – scholar with over 30 years of industry experience conducting a workshop for sales managers at a different company (name disguised as FinanceCo in the paper) and in a different industry. While the practitioner – scholar is an expert, the sales managers who are receiving the training are experts within their domain of knowledge. This dynamic challenges the conventional mindset of a trainer being the expert and the receiver being a novice. The dynamic is then generalized to the broader community of informing actions.

Keywords: Sales, Training, Transformation, Change Management, Informing Science, Complexity, Innovation Diffusion, Systems Theory, Social Science Research..

INTRODUCTION

Sales training typically involves a sales manager, in-house trainer, or outside consultant presenting to a group of salespeople to cause a change in selling behavior. For major changes, it's common to bring the sales force together in groups to conduct the training as a combination of classroom lecture and role play activities. The material for such events is commonly developed by a corporate group (e.g. training department, talent development, marketing, sales operations) or purchased from a third party. Third party material is sometimes tailored by the firm or consultant to reflect a company's specific environment.

Implicit in sales training are the assumed roles of the trainer as an expert and the individuals being trained as less informed – at some level, novice. Unfortunately and largely unknown to practitioner informers, the expert – novice paradigm creates multiple foundational issues for informing. First, there is an implication that the salespeople see themselves as less accomplished than the trainer and in need of training. Second, it is assumed that the training material was developed with both the facts the intended recipients require and in the context of the field seller's mindset. And third, by the nature of attempting to train everyone at the same time, there is an assumption that the

sales training participants and their customers are equally likely to adopt the newly trained sales behaviors. Collectively these assumptions establish a brittle training dynamic with multiple opportunities for failure.

Expert Status

The Shannon Weaver model for communication shown in Figure 1 illustrates the roles of transmitter and receiver in communication and includes a feedback loop from receiver to transmitter. [1] This model is well understood in person to person communications. Body language and checking for understanding provide ample forms of feedback. But what about higher levels of abstractions and informing activities? Informing Science provides a rich foundation for understanding the receiver's potential responses to the training information.
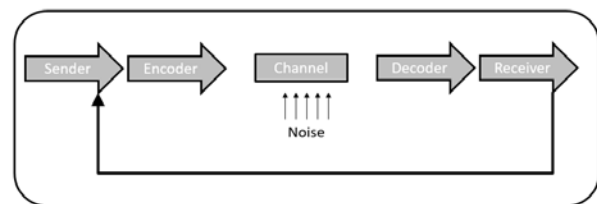

Figure 1: Shannon-Weaver Model of Communications adapted from *Informing Science Volume One: Concepts and Systems*

Gill in *Informing Business: Research and Education in a Rugged Landscape* presents Figure 2 to aid understanding on how a receiver processes inbound information. [2] The model identifies individual filters and bias that a receiver applies in judging inbound information. For our sales training, one can easily imagine examples of channel filters and attention issues with informing a sales force - jet lag, room temperature, language barriers, and other work responsibilities are just a few. Sales training can also have a fast path to long term memory when the training fits a salesperson's preexisting ideas of the marketplace and aligns with immediate needs. More challenging is informing a salesperson when the salesperson believes the inbound information triggers a cognitive challenge by presenting a risk to the salesperson. This risk could be in longer sales cycles requiring the salesperson to work harder or because the salesperson is unaware of business drivers necessitating the change in selling behavior. At this level the informing challenge is significant. Even more difficult is overcoming a salesperson's visceral filter. At this top level filter the salespeople are facing a fight or flight instinct. An example would be, a salesperson fearing loosing significant compensation or being fired due to poor sales performance because the salesperson perceives the product as not ready for sale or thinks customers won't want the new capabilities. In both the cognitive and visceral filters, salespeople discount the validity of the inbound information by applying filters based on their own expert knowledge of the

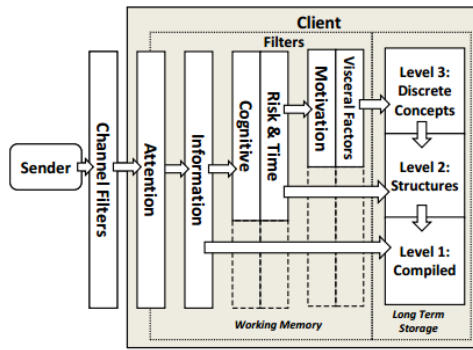localized domain. The sales training is a complex environment with multiple points of localized fitness.

Figure 2: Single Client Resonance Model from *Informing Business: Research and Education on a Rugged Landscape*

Curse of Knowledge
The second challenge for informing experts comes from the Curse of Knowledge. Chip and Dan Heath present the Curse of Knowledge in the book *Made to Stick*. [3] The essence of the Curse of Knowledge is that the more expert a person becomes on a topic the more difficult it is to remember what it was like to not know. Experts view concrete details as examples of higher order concepts rather that concrete facts. In other words, you can't unlearn something. This is particularly problematic in developing and delivering sales training. Trainers typically know a great deal more about the context of the training. The trainers have usually spent months identifying the need for training, justifying the expense, and then developing and planning the training delivery. These trainers and the supporting ecosystem are experts in the need for the training and the material itself. Compare this to a salesperson who just stepped into a meeting for training with little to no context and the challenge is apparent.

Heath and Heath go on to cite research performed by Beth Bechky to support the Expert – Novice informing challenge. Bechky's research took place in a complex manufacturing environment where engineers had to work with manufacturing resources to solve difficult production issues. [4] In reviewing Bechky's work, the crux of the issue is context of expertise. The manufacturing resources were equally expert as the engineers - just in a different domain. The engineers were novice with regard to the physical world of manufacturing and the production resources were expert in the physical world of the plant floor.

Likelihood to Adopt
The final challenge for sales training identified by the practitioner-scholar for experts-informing-experts is recognition that the salespeople being trained will adopt the new sales behaviors at different times and some will not adopt at all. Rogers explains this phenomenon in *Diffusion of Innovations*. [5] A new sales behavior can be thought of as an innovation. Rogers notes in the text that the common characteristics of innovation diffusion have been observed across regions, cultures, and applications. It seems innovation diffusion is a part of human nature.

Innovation diffusion theory explains that individuals will adopt innovations over time. The theory segregates a population based on when the group will adopt the innovation. There are five innovation diffusion segments: Innovator, Early Adopter, Early Majority, Late Majority, and Laggards. Roger's explains, non-adopters are grouped with Laggards due to the commonality in adoption characteristics between Laggards and non-adopters. Figure 3 shows the five stages of adoption and the percentage of the population that typically falls into each segment. The unfortunate reality is that salespeople who do not adopt new sales behaviors are often released from their positions.
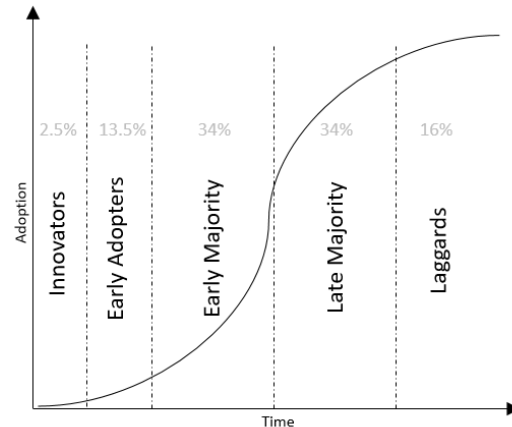

Figure 3: Innovation diffusion adapted from *Diffusion of Innovations*

Innovation diffusion theory provides important insights into how to accelerate adoption through the use of change agents, offering low risk trials, and in producing observable outcomes. Innovation diffusion theory also notes that there is an innovation bias where researchers and those who wish to have people adopt the innovation believe that it is better to adopt the innovation. While it may be true for the population at large there are segments where it is better to wait. Roger's notes that examples of risk for a smaller farmer in trialing a new farming technique. For a salesperson one can imagine that it would be wise for a salesperson to wait to try to sell a new product if the salesperson's customer was historically slow to adopt new ideas.

Rogers goes on to note a serious issue for researches that is equally applicable to sales training – Person Blame. Rogers builds on work from Caplan and Nelson [6] that examined social science research to identify how situational causes were attributed to people. In other words, blaming people for their predicament. While certainly true on occasions, it is equally true that sometimes a salesperson's territory is not conducive to a new sales technique or product and the salesperson's delayed adoption is a rational response to the situation.

Training Circumstance
With knowledge of the challenges associated with expert status, the Curse of Knowledge, and innovation diffusion the author created a training workshop for the highly qualified sales leaders at FinanceCo (name disguised). The practitioner-scholar had primarily worked in high technology and telecommunications and the group to be trained was from the finance sector with an average 20 years of sales experience and 5 years of sales management experience. The practitioner-scholar was invited to participate by the sales enablement group at FinanceCo. The sales enablement team was new and was seeking a way to demonstrate to the sales managers that new selling behaviors were needed. The sales enablement group felt that having an

expert from outside the company and industry with academic credibility would assist them in making the case for change.

REVIEW OF RESEARCH

Methods

Several different methods were used to examine the phenomenon of experts-informing-experts in sales training. First, in the broadest sense, the research was performed as Action Research. [7] The practitioner-scholar was an active part of the research with the goal of altering the environment by informing the subjects of the study. Prior to training, the practitioner-scholar provided the sales training participants background information on the theories that were going to be reviewed and two surveys. The first survey assessed the sales manager's likelihood of adopting solutions selling techniques (the innovation) and the second survey asked the sales managers to rate their agreement with statements about solutions selling behaviors. Solutions selling is a sales approach that focuses on solving the customer problem. Other examples of sales techniques are price, feature, and bundles. [8]

In total there were 22 sales managers from three levels of management. The three levels of management were: First Line Sales Managers, Managers of Sales Managers, and Executive Management. All 22 of the sales managers were from the same company. This commonality provided a natural experiment to investigate innovation diffusion in an atypically uniform group of salespeople. Beyond the common experiences and long tenure in the sales profession (average 20 years sales experience and 5 years sales management experience), the company also had a consistent established culture of investing heavily in its people with training and regular coaching. The company's culture was deeply engrained and focused on being consultative with prospects and clients to find the best solution for their client's needs. 18 of the 22 sales managers completed the pre-training self-assessment of agreement with solution selling behaviors. The average score for the group was 4.4 on a 5.0 scale. The lowest score was 3 and 8 of the 18 scored themselves as 5.0.

As part of the sales training, the practitioner-scholar shared the results of the self-assessment of solution selling behaviors and the pre-training likelihood to adopt solution selling behaviors survey. The quantitative statistical analysis included descriptive statistics of the stated beliefs that solution selling was valuable and an exploratory statistical analysis using cluster analysis to determine how the sales manager population compared to the predicted innovation diffusion groups (Innovators, Early Adopter, Early Majority, Late Majority, and Laggards).

Last, FinanceCo's sales enablement team asked the sales managers to provide feedback on the training regarding what material resonated for the participants and what information did not. The sales enablement team provided the verbatim comments to the author with no attribution to the individual who made the comment. The comments were then examined following the three step coding process described in the qualitative grounded theory approach by Creswell. [9] In the first phase, open coding, major topics are identified. In the second phase, axial coding, causal conditions are examined for a major topic and then, in the final phase, selective coding, the researcher develops a model or story for the observations.

Findings

The research found support for self-defined expert status, the Curse of Knowledge, and the predicted innovation diffusion groups. Individual filters and bias was demonstrated in the differing levels of engagement self-reported by the sales managers in responding to what resonated and did not resonate in the training. The comments ranged from agreement and excitement to disagreement and dismissal as "too academic". Table 1 lists the comments separated into three groups based on the level of engagement indicated in the responses.

Table 1: Responses to Resonate / Not Resonate

Not Engaged	Somewhat Engaged	Engaged
Highly academic in nature	OK	Different refreshing
A lot of content was disengaging	Fundamentally disagree	Thought provoking
Too much content	See how it fits with firm's culture	Interesting topic
Some complex and difficult to follow	Resonate with our current state	Content valuable
Tie directly to business line	Content relevant for that group	Content was very relevant
More other company stories		Valuable perspective
		Impactful
		Enjoy outside perspective

The Curse of Knowledge is revealed by the increasing levels of abstraction represented in the list of sales process disruptions shared by the sales managers during brainstorming. Table 2 lists the responses separated by degree of abstraction. The sales managers were asked to work independently and reflect on disruptions to the sales force. Next, the individuals shared their responses with the group and the practitioner-scholar scribed the responses on a flip chart for the group.

Table 2: List of disruptions by sales manager level

Sales Manager	Manager of Managers	Executive Level Manager
Market Events	Outage	Government Regulation
New Processes	Products / Services	Passive Investing
New Products	Staffing, Talent	"Robo" Advising
Fees	Competition	Competition

Last, Figure 4 shows the results of the pre-training survey on innovation adoption likelihood of solution selling. Somewhat surprisingly, given the small sample size, the scree plot from the cluster analysis indicates support for five clusters consistent with innovation diffusion theory. Strong support is present for three clusters which in itself provides backing for the expectation that the sales managers will adopt solution selling behaviors at different times.
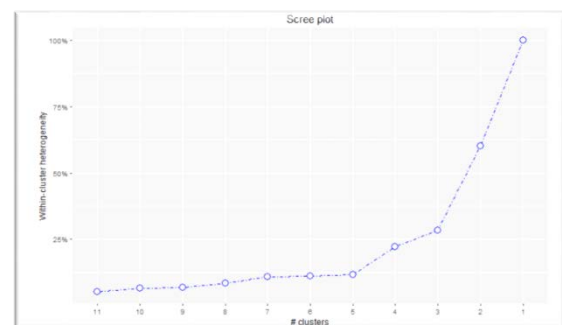

Figure 4: Scree plot of likelihood of adopting solution selling

THE THEORY

As one would expect no one theory can fully explain the complex nature of sales training in the real-world muddled environment. That said, there is support for three general theories or more appropriately conceptual schemes. [10] These

schemes can be used to understand and more importantly modify the delivery approach for experts-informing-experts. First, informing science provides rich context for understanding how a receiver – expert will evaluate inbound information. If the information is consistent with existing conceptual models and beliefs then the information can be quickly absorbed into memory. In contrast, if the information is cognitively or viscerally different from what the individual believes then there is high likelihood that the information will be discounted, modified, or rejected. The second conceptual scheme in play is the Curse of Knowledge. Experts migrate to abstractions and view individual events as examples of broader strategic concepts, while individuals see the individual events as concrete disassociated items. The Curse of Knowledge is evident when trainers fail to establish the reason for the training or forget key steps in applying the training. The experts understand why the training is needed and have forgotten the steps / difficulties associated with applying the new skills. Last, innovation diffusion theory explains that the sales population will adopt the training at different rates and that some of the population will not adopt. The theory also adds much needed critical thoughtful reflection in noting innovation bias and person blame constructs associated with new innovations. In short, person blame is blaming a person for their circumstance and innovation bias is the belief that it is in everyone's best interest to adopt the innovation as quickly as possible. In the sales context, a customer that does not respond to the innovation is an easy to see example where it is not in a salesperson's best interest to adopt a new selling innovation.

DISCUSSION AND APPLICATION OF THEORY

Recognizing that some of the sales managers were unlikely to immediately embrace the concepts being presented (innovations), the practitioner-scholar began the workshop with an exercise designed to engage each person, establish a common understanding of the problem space, and develop a consensus for action. The exercise was designed to communicate the "Why" the sales managers should want to engage in the training. Specific content goals were to establish relevance, context, and impact. The exercise was delivered in two parts. Part one had each sales manager work privately to identify issues related to the training. Then, in the second part of the exercise, the group shared some of their individual responses and discussed issue impact. This approach created the opportunity to have the sales managers self-indict privately while working together to develop consensus on the need to change. The pre-training self-assessments and surveys were also used to illustrate the need to change and provide objective relevant data that supported the training material. This exercise demonstrated the Curse of Knowledge as there were different levels of abstraction in the responses. Even greater levels of abstraction are likely with higher level management who have broader scope of control. Disruptions like behavioral finance [11] and diminished mental capacity of an aging population [12] would likely appear at even higher levels in the organization.

Following innovation diffusion theory, the practitioner-scholar knew some of participants were going to embrace the concepts with little support and others would completely reject. To maximize the return on the investment in time and resources, it was important to use highly adaptable training techniques and be prepared to alter the training material based on reading the group's acceptance of the material. Accepting this reality, the practitioner-scholar was able to avoid non-productive dialogue from individuals who were not going to adopt.

Consistent with informing science, stories were cited by participants as material that resonated most for them. With the embedded context, stories make concepts concrete. As noted in the Curse of Knowledge, it's important to find concrete topics when individuals have different contextual references.

While the research reported in this paper focused on sales training, the underlying constructs of experts-informing-experts are universally applicable. Organizations have a myriad of informing activities that occur at various levels and functions every day. Task coaching, corporate strategy, all hands meetings, board meetings, and quarterly business reviews are just some of the internal informing activities. Externally, there are customer, vendor, and partner distribution meetings. In each occurrence there is an element of informing taking place. Moreover, experts-informing-experts is also applicable to academy. While the dominant thinking is that faculty is the expert and students are novice the reality is that the students are experts of their context. It is the student who determines to what degree they need to know the information being communicated and if they viscerally reject the information.

CONCLUSIONS

If we accept the premise that we are experts-informing-experts and our goal is to successfully inform the receiver of the information, then the following suggestions should be considered when designing and delivering informing activities.

First, develop training with a focus on why the receiver will want to know the information or why the receiver will reject the information. Communicate the "Why" for the training with relevance, context, and impact to the individual training subjects.

Next, indict the group to illustrate the need for informing and lower personal bias and filters early in training. Use tools like pretests, participatory brainstorming on problems, video, and surveys to provide a personal consequence to the informing.

Third, use a variety of highly adaptable techniques to address innovation adoption likelihood. Techniques like self-selection, trial, observability, and change agents should improve informing success.

Use concrete terms to address differences in context. A company example is not sufficiently relevant for all participants. The informing environment is complex with multiple different points of view. Instead, use multiple stories that include the context of the event. It is also important to use real examples and simplify language to find concrete elements that bridge contextual differences and promote concepts to memory.

Last, accept everyone will not "believe" and that adoption will occur over time. As experts it's our belief that the information we are sharing is important and relevant but the receiver makes the decision on whether or not to adopt. They are the experts.

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