

Trends

in Agent and Manager Training

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When you really think about it, teaching people skills out of a handbook doesn't make any sense at all. Is that the way you learned to swim? Is that the way you learned to play ball or play the piano? Would you fly with a pilot who only learned about flying from a book? Obviously not — people learn skills a little bit from the book and a lot by just doing it over and over until they gain competency. They learn skills in an environment that is similar to — if not exactly like — the environment in which they are going to perform. Bands rehearse the songs they are going to play with the instruments they are going to use; football teams scrimmage on a football field. In short, they practice in a simulation of the real thing.

THE NEW WAY OF TRAINING Simulation-based training is becoming a bit of a buzzword, isn't it? Well, that's because the scrimmage and the practice room are exactly that, simulation-based learning. People are put into virtual scenarios in which they react with prospects, employees, or clients, and learn how to handle themselves, what to say, and so on. If simulation-based learning truly is the natural way to learn skills, what have trainers been doing with all this paper for all these years?

THE OLD WAY OF TRAINING When trainers had time and money to do one-on-one, hand-holding and guidance, they used simulation-based learning. It's like hiring a personal trainer for golfers. It stills happens today when agency managers take time with new agents. But with time being money (and money being scarce when it comes to training budgets), trainers are supposed to train hundreds of people. Thus, hands-on guidance isn't going to work unless managers do it themselves. Since managers have a lot on their plates, this doesn't seem to be done enough.

So, enter paper as the solution. Write up a handbook and send it out to the agents. Line them up in a classroom and show it to them. Or, use some really "new" technology, such as PowerPoint. Or, if managers are really cool, they put it on the Internet.

What's wrong with all this is that no matter what form it takes, it is still presentation-based training — that is, show it to them now and hope that months later when they need to know it, they'll remember it. Well, come on. Do they really get skills from watching? No. The fact is, the further application is away from comprehension, and comprehension is from knowledge, the smaller the learning transfer. Time kills.

Plus, what relevance does paper have to sitting across the table from a prospect who just asked a buying question you didn't recognize? It sure isn't like having months of batting practice before the big game. How can anybody learn to apply sales skills by watching someone else, or reading it out of a handbook months before they need it? Not very well. Turning pages is inconsistent with how people *really* learn.

Using handbooks means turning pages. Using a PowerPoint slide show is like turning pages. Classroom learning is like turning pages. Even “interactive” Web-based training is usually just a higher-tech way to turn pages, the interactivity being the “Next Page” button.

GETTING BACK TO (HUMAN) NATURE The reason presentation learning became the conventional way to do training is simple: That was the best way to distribute learning content over distance.

That’s not true any more. With the Internet, learning content can be distributed instantaneously around the world to all your branch offices. You don’t have to spend thousands of dollars bringing trainees into the home office. You can send the home office out to them.

But that’s not all. High-bandwidth connections now allow *a lot* of content to be distributed, which means that you can put back that one-on-one coaching thing that is so critical to natural learning. You can go to trainees through distance learning, which is cumbersome and expensive, or you can create a virtual environment for them to learn in.

Having said that, however, the Internet isn’t absolutely necessary for you to take advantage of the trends that are emerging. Computer-based training (CBT) is changing as well. Most of what you can do in a Web-based format can be done with a single computer and a CD — with notable exceptions, which I’ll get into later.

VIRTUAL LEARNING AND PRACTICE ENVIRONMENTS Authoring tools, such as FlashMX and Authorware, have made a huge difference in the way training content can be developed. But they are only as good as the developer. PowerPoint might still build a really cool page-turner, but that’s not getting to the new opportunities technology offers. Presentations still require turning pages. The performance environment is nothing like turning pages, so neither should the practice environment.

A virtual learning environment is a place much like the performance environment, a place where the learner learning the skill can experience what it’s like to perform the skill, but without fear of screwing up in front of people who are going to laugh. A batting cage is a non-threatening place to learn and practice critical baseball skills. Now *there’s* a great virtual learning environment analogy. It isn’t exactly like being in the big game, but you can sure learn and practice the fundamental skills required.

Let’s create a batting cage for sales skills. It’s going to be a non-threatening place (nobody’s going to really hang up on you) to learn two important things about selling: what to expect when you start making cold calls and how to handle situations that arise in the conversation. The “What to Expect” side of the training environment is a function of how realistic the situations are. The “How to Handle” part is a function of how the home office wants learners to apply the skills.

If you create enough carefully designed and realistic scenarios, learners will eventually learn everything you want them to know about the sales process. *How do you get to Carnegie Hall? Practice, practice, practice.*

Through repetition, the learner will be conditioned to respond to objections in the way the home office thinks is best. When the agent gets on the real phone, as soon as he or she hears someone say “I’m not interested,” he or she, like Pavlov’s dogs, will say “May I ask you why you say that?” without thinking. Now, *that’s* training!

This, of course, isn’t just for sales. It’s for any interpersonal skill, like handling employee conflicts or applying the theory of performance coaching for managers. Anything — and it isn’t just a way to learn soft skills.

When is it really critical for somebody to know a fact, a procedure, or any piece of knowledge? Drawing on my own background as an insurance and financial products salesperson, I’ll tell you the answer: when the client, prospect, manager, or boss asks you a question that you really should know the answer to. That’s when!

Trainers spend a lot of time trying to force facts into learner’s tired brains. The problem is that knowing how interest is earned and paid on an annuity policy at the end of the day after a big lunch does not carry the same *relevance* or *urgency* as it does when you are sitting across the table from a client who is expecting your competence. Big difference. The blank stare doesn’t quite cover the blood rushing to your face when you realize you don’t have a clue.

So a virtual learning environment can be a vehicle for teaching hard knowledge as well as soft skills.

LEARN IT WHEN YOU NEED IT If you are in a non-threatening learning environment and are asked the sticky annuity question, guess what — you can stop the simulation and find the answer. You won’t lose a sale and you won’t be actually embarrassed. But if the simulation is realistic enough (consider the ultimate simulation — Star Trek’s Holodeck), I’ll guarantee that you won’t forget how interest is earned and paid at annuitization.

The same goes with the interpersonal skills. If, when someone says “I don’t need life insurance,” you learn to say, “You may not, but let’s talk about your situation first and determine if there are any weaknesses we should look at,” instead of “What if you die tomorrow?” then you will be conditioned to apply consultative sales principles.

Learning things exactly at the point when they are relevant and important to learn means a far higher learning transfer.

ENGAGEMENT So, how do you keep learners on track? How do you make them want to learn? No matter how cool the program, you still have to get them to use it. The easy answer is that you have to present it so they *want* to do it. But how? Let’s go back to human nature. People love stories. People love challenges that they can see themselves winning without a whole lot of work. People love to play games. It’s only logical then that you should incorporate these things into a simulation-based learning program in order to get and keep their attention.

Fortunately, scenarios are little story lines, aren’t they? And a day at the office is really a bunch of scenarios strung together, right? So let’s create a story line structure that strings together learning scenarios in a logical flow. Cool. Using an agent, Bob, as the example, let’s start his day by having him face a cold-call simulation. In that scenario, he learns and/or practices his skills at opening the presentation, creating trust and confidence, uncovering a need he can solve, and asking for the appointment. Let’s say he gets an appointment for later that day!

The next thing in the “day in the life of an agent” might be where he has to apply and/or learn some procedure, like filling out paperwork or researching more people to call or whatever.

Then Bob takes a call in which he has to learn and/or apply another skill. What we are developing is a movie in which he is the main character, a movie with subplots, suspects he has to sort through, prospects he has to develop into clients, clients he has to handle, and so on. He has to develop each prospect to succeed in the subplots and the movie.

Let’s add another element. Let’s not string these scenarios together for Bob, rather let’s make it nonlinear. Let’s create it so he is guided to make his own decisions about what to work on next. Now he’s driving his own destiny, and getting rewarded for choosing well or prodded or even penalized if he does something stupid, like forgetting to go to the appointment, or not filling out paperwork that he really should have. Maybe the “something stupid” is not prospecting. Hmm.

When he successfully learns and/or applies the tasks required to reach a happy ending, he is rewarded. Maybe it’s a game in which closing more virtual business earns him more virtual dollars. Wait a minute. Isn’t that just like the real career?

The bottom line is this: What’s going to work is a structure that puts critical knowledge acquisition, comprehension, and application together in progressive scenarios of a bigger story line, which is relevant to the learner’s career. Sprinkle in game devices along the way to create challenges learners can resolve by learning and/or knowing things, and the idea really starts to hum.

MAKING VIRTUAL ENVIRONMENTS Role-playing is the conventional way to create these virtual learning environments. But, as we know, people have to be together — and that’s expensive — and from personal experience and observation, we know that people tend to talk about role-playing more than they actually role-play. And, come on, how many role-playing sessions are terribly realistic anyway? Those giggles just aren’t right. And how many times can one person do a role-play in a class of 20?

So the challenge is to create a realistic, time-efficient, self-paced role-play session. Since I’m a software developer, you’ll probably not be surprised when I suggest software. But it’s simply the best tool. Simulation-based, scenario-based software programs can be distributed to the field cheaply, so that learners can role-play in very realistic scenarios, as much as they want or need. It’s a no-brainer.

VIRTUAL COACH AND MANAGER The other nice thing about all of this is that we can create a patient instructor to coach the learner through all of this. This can be the best and wisest branch manager you’ve ever seen, one who can be there for the agent any time he or she needs. Any time! This virtual manager could be there to guide, reward, and coach learners as they go through the programs. The virtual manager can also make sure tests are taken and results sent back to the home office, progress reports are filled out, and so on. You want to hire this person, right? Imagine how the agent would feel.

CONTROLLED, FLEXIBLE, AND CONSISTENT DELIVERY One of the terrific things about the Internet and CBT is that the training content you develop and distribute is going to be the same for everybody. Based on the best practices that the home office develops, the program can be designed to train everyone on the same techniques, the same product-knowledge answers, the same ways to handle objections and make presentations, and so on.

But content developed through the Internet goes one step further, and that’s flexibility. Change one thing on

one page, and suddenly everybody has the newest content.

The Internet has one more huge advantage over CBT: accountability. Web-based training can write back to a database on the server, so that an administrator can keep track of what each learner is doing, from test scores to how many pages of content they've gone through, to how many simulation scenarios they've practiced.

Web-based programs can even automatically keep learners on track. Say a manager is supposed to finish a course by next Tuesday. Come Monday, if he or she hasn't started it, an email can be automatically generated, warning the manager that there is only one day to get it together. Think about the time this could save the overworked people at the home office!

All this doesn't just have to be used by the agent asynchronously. If designed properly, much of this kind of structure can be used by instructors in the classroom to generate collaborative exercises. Then, when used by the learner back at the office, the program will be very familiar.

THE FUTURE OF TRAINING With the new technology of the past 10 years, even five years, a return to the natural way to learn skills is possible. Paper-based was great when there was no alternative, but today it truly isn't the best option. With today's technology, we can exploit human nature to put people into learning environments that engage them and teach them what they need to learn, right at the point when they need to learn it. And we can distribute this instantly and consistently around the world.

What's the ROI? When training can be made far more time-efficient, reduce high-burnout options like classrooms and travel, and can help people learn, understand, and apply the things you want them to know much faster, the ROI question becomes a no-brainer.

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