

The following was written for a website that promoted my consulting capabilities in sales training.

Consulting Projects

Establish a Selling Skills and Product Knowledge Baseline for Fortune 50 Global Pharmaceutical Company's International Franchises. Franchises and affiliates of this global giant were on their own to train their sales teams. As result, training was sketchy and uneven at best. We created a complete sales training curriculum for delivery to sales reps in more than 26 countries. The training was built in modules to enable countries and regions to pick and choose amongst the product lines they sell. Case studies and role-plays were modified according to the local market. The program was received with enthusiasm, and all franchise reps now have a baseline of product and clinical knowledge and selling skills.

Review and Test Consultative Selling Skills on a Budget for Far-flung Hospital Supply Sales Force. A division of this Dow Jones Industrial company sells skin care and specialty chronic wound care products to hospitals, clinics, and physicians. Regional Sales Managers wanted an efficient way to reinforce and test the consultative (customer-focused) selling skills of their reps. We created *Selling to the Hospital*, a digital case study that presents a series of situations and quizzes reps on how they would respond to each of them. The reps enjoyed the training and managers learned what coaching, if any, was needed to improve their reps' consultative selling skills.

Train Healthcare Insurance Customer Service Reps at Launch of New Computer Workbench. A major healthcare insurer was getting ready to launch a new computer workbench for their customer service reps at working call centers. Reps use the workbench to access data they need to respond to customer questions about qualified benefits, billing, etc. Customer service reps were resisting the change. The workbench software was a moving target up until the day of the training. Our training overcame both obstacles, and the reps accepted the change and quickly learned the new system.

Analyze Front and Back Office Tasks to Aid a Leading Financial Services Company in Managing Change. This international financial services company wanted to reengineer the way their front and back office staffs were trained and employed. Cross-training the company's specialized staffs would ease coping with the surges in customer requests that vary with market conditions. Detailed job descriptions of each of the staff specialties had never been developed. We interviewed the various specialized staffs, itemized and rated the difficulty all tasks for each specialty, then summarized the data to provide the company with a document that helped them determine the training needs to realize their objective.

Build Leadership Skills for Sales Managers at Leading Mutual Fund Company. This high-flying mutual fund company wanted to change the thrust of their customer service representatives' client contacts. The company's call center reps took great pride in their ability to provide customers with the answers they needed and went to great lengths to get the answers that were not immediately available. Executive management however wanted reps to play a more aggressive role in their client contacts. The new customer service rep would identify and act upon the selling or retention opportunities that lay beneath the surface of a customer's request for information. This more aggressive posture was a major culture change and required the full cooperation of all involved to implement. We conducted focus groups with supervisors and top-performing reps to learn their attitudes about the proposed change. Then we identified the behaviors needed to execute and built training for managers and their reps that helped smoothe the transition to the new culture.

Provide Digital Product Training for a New Line of Clinical Products. This pharmaceutical company and supplier to hospitals developed a new line of skin care products for use by physicians and nurses in operating rooms and following routine patient care. Several of the company's specialized sales teams were charged with promoting the new products, and the company wanted an efficient way to get product and marketing information quickly into the field. We developed a digital solution that distributed the information and quizzed sales reps on their knowledge. Upon each rep's completion of the training, quiz results were automatically sent via email to sales and training managers.

Raise Ethical Awareness and Develop Ethical Reasoning Skills. We collaborated with Dr. Ronald M. Green, Director of the Ethics Institute at Dartmouth College to produce Introduction to Business Ethics, an interactive digital program in ethical decision-making. The program presents a model for making decisions in business situations where values conflict. A case study, based on a real situation involving an IBM sales manager and a member of his sales team is used to demonstrate the model. Using Green's model as their guide, participants have the opportunity to test their understanding by choosing amongst various reasoned options along the path towards making the ethical decision. Introduction to Business Ethics is designed to be used either as standalone training or in combination with a classroom program customized with additional industry-specific case studies.

Introduce Revolutionary Product Technology via Customer-focused Workshops. This leader in automated blood collection technology developed a revolutionary new product. Once customers, such as the American Red Cross put their product to work, they would realize benefits that include lowering blood collection costs, providing a more reliable supply to hospitals, and helping to eliminate seasonal shortages. To realize these benefits, blood collection agencies would not only have to learn a new technology, but dramatically change the way they managed their operations. We worked closely with senior management to develop a strategy that would both clearly demonstrate the benefits of the new technology while providing valuable information that prospects could utilize—whether or not they purchased the product. A key goal was to come up with an approach that would not feel like an elaborate sales call. We designed a series of customer workshops and positioned them as important educational events. Each prospective client sent a team of key operational people, and each team was composed of all the people who might be involved in the purchasing decision. The customer teams, using their own blood center collection data, participated in a series of activities designed to demonstrate the benefits of applying the company's new technology. The workshops proved to be a great success and were later adapted for the European market.