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AN EXPLORATORY STUDY OF THE QUALIFICATIONS OF THE
SALES TRAINER AND THE CHARACTERISTICS
OF THE SALES TRAINING TASK

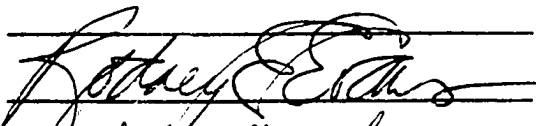
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SUBMITTED TO THE GRADUATE FACULTY
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degree of
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BY
EUGENE ROBILLARD
Norman, Oklahoma

1972

AN EXPLORATORY STUDY OF THE QUALIFICATIONS OF THE
SALES TRAINER AND THE CHARACTERISTICS
OF THE SALES TRAINING TASK

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TABLE OF CONTENTS

	Page
LIST OF TABLES	iv
ACKNOWLEDGMENT	vii
CHAPTER	
I. INTRODUCTION	1
Background and Need for the Study. . .	6
Statement of the Problem	12
Limitations.	13
Definition of Terms.	15
Organization of the Study.	16
II. REVIEW OF RELATED RESEARCH	18
Concluding Remarks	35
III. RESEARCH DESIGN AND METHODOLOGY.	38
Questionnaire Construction	40
Sample Selection	45
Questionnaire Administration	48
Statistical Treatment.	51
IV. ANALYSIS AND INTERPRETATION OF THE DATA	54
Personal Data.	54
Company Information.	69
Job Information.	77
The Sales Training Program	94
Other Training Information	106
Summary.	107
V. SUMMARY, CONCLUSIONS, AND RECOMMENDA- TIONS.	110
Summary.	110
Findings	111

CHAPTER	Page
Conclusions.	120
Hypotheses	126
Recommendations.	127
BIBLIOGRAPHY	129
APPENDIX I	135
APPENDIX II.	143
APPENDIX III	170

LIST OF TABLES

TABLE		Page
1	Questionnaire Mailing and Processing Data.	52
2	Sources of Responses by Category of Title	53
3	Major Fields of College Undergraduate Study of Respondents.	56
4	Major Fields of Graduate Study Among Respondents	57
5	Mean and Median Number of Years of Work Experience of all Respondents, in Selected Occupational Positions	60
6	Number of Respondents Reporting Years of Experience in Selected Work Categories	61
7	Sales Trainer Experience-Profile. . . .	64
8	Number of Respondents Reporting Position Held Prior to Present Position.	66
9	Number of Respondents Reporting Having Had Formal Trainer Preparation.	67
10	Number of Respondents Reporting Estimates of Time Expected to Have Served in Sales Training Capacity for Present Employer.	68
11	Classification of Respondents by Respective General Industries	70
12	Classification of Companies Represented by Respondents.	72

TABLE		Page
13	Number of Respondents Reporting Field Sales Experience in Same Field as That in Which They Now Conduct Sales Training.	73
14	Classification of Respondents by Specific Industries and Sales-Training Relationships	74
15	Categories of Customers of Companies Represented by Respondents.	77
16	Number of Respondents Having Immediate Supervisors with Sales/Marketing or Non-Sales/Non-Marketing Formal Titles	79
17	Categories of Reported Titles Held by Superiors of Respondents.	79
18	Number of Respondents Reporting Having Co-Trainers Who Conduct Non-Sales Training.	80
19	Representative Proportions of Work Activities Reported by Respondents.	81
20	Extent of Sales Training Conducted in the Field by Respondents.	83
21	Relative Extent of Groups of Individual Sales Training Performed by Respondents Providing Field Training.	84
22	Formal Evaluation of Attitudes of Sales Trainees at Inception of Training	86
23	The Receipt of Formal Progress-Reports on Trainees After Sales-Training Phase is Completed.	87
24	Minimum Qualification the Sales Trainer Should Have, as Recommended by Respondents	88
25	Comparison of Selected Minimum Qualifications Recommended by Respondents with Selected Qualifications Possessed by Respondents	91
26	Reported Criteria for Evaluating the Work of the Sales Trainer.	93

TABLE		Page
27	Reported Status of Work-Familiarization for New Salesmen Prior to the Training Program	95
28	Reported Types of Work-Familiarization for New Salesmen Prior to the Training Program	96
29	Reported Frequency with Which Respon- dents' Sales Training Classes Convened. .	97
30	Representative Proportion of Emphasis in Sales Training Programs Reported by Respondents	98
31	Reported Methods Employed in Respondents' Sales Training Programs	100
32	Reported Training Aids Employed in Res- pondents' Sales Training Programs	102
33	Reported Basis for Employing a Particu- lar Method, Content, Technique or Train- ing Aid in Respondents' Sales Training Programs.	103
34	Reported Existence of Follow-Up Sales Training Exclusive of Work with Field Sales Managers.	104
35	Reported Types of Follow-Up Sales Training.	105
36	Reported Existence of a Separate Formal Sales-Training Program for Experienced Salesmen.	106
37	Reported Existence of Specific and Separate Forms of Sales Training Con- ducted by Field Sales Managers Only . . .	107
38	Reported Existence of Formal Training Programs for Sales-Manager Designees. . .	108
39	Reported Existence of Formal Training Programs Designed to Train the Sales Manager	108

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AN EXPLORATORY STUDY OF THE QUALIFICATIONS OF THE
SALES TRAINER AND THE CHARACTERISTICS
OF THE SALES TRAINING TASK

CHAPTER I

INTRODUCTION

The training of field salesmen is recognized as a necessary activity for the sales organization. Until recent decades, this task has fallen almost wholly within the responsibility of the field sales manager. In the majority of cases, the sales manager continues to have the responsibility of training the salesmen he supervises.¹

With the secular shift in marketing from product-orientation to customer-orientation, it has become necessary for sales training to accommodate the altering diversity in markets, the variations in the company's offer, the complexity in product technology, the character of competition, and the emerging social implications of sales work.

¹Morgan B. MacDonald and Earl L. Bailey, Jr., "Training Company Salesmen," *Experiences in Marketing Management*, No. 15 (New York: National Industrial Conference Board, 1967), p. 5.

Accordingly, the job of the field sales manager has placed greater overall demands on him, and although he affirms it as his most important function,² he is able to spend only about 20 percent of his time doing such training, according to one study.³ This finding lends credence to the quote taken from one marketing executive:

It is easy enough. . . .for a sales manager to organize a (training) program; but the execution of this program requires a fair amount of time and effort on the part of many people in order to make the program effective. Trying to fit the time for this effort into schedules which are already overloaded is an extremely difficult task.⁴

Wotruba feels he may lack not only time, but also teaching ability.⁵ Moreover, there are indications that his job is becoming gradually "converted to a staff position and (his) line responsibilities are slighted or ignored altogether."⁶

²Morgan B. MacDonald and Earl L. Bailey, Jr., "The First Line Sales Supervisor," *Experiences in Marketing Management*, No. 17 (New York: National Industrial Conference Board, 1968), p. 22.

³Rodney Evans, "An Empirical Analysis of the Role and Function of the Field Sales Manager," (unpublished Ph.D. dissertation, Michigan State University, 1966), p. 46.

⁴MacDonald and Bailey, "Training Company Salesmen," p. 4.

⁵Thomas E. Wotruba, *Sales Management: Planning, Accomplishment, and Evaluation* (New York: Holt, Rinehart and Winston, Inc., 1971), p. 373.

⁶Rodney Evans and W. J. E. Crissy, "The Field Sales Manager: How He Sees Himself," *Sales Management*, September 15, 1969, p. 51.

A more integrated grasp of his firm's marketing planning will require greater liaison with superiors and more of his attention at a time when the same above factors demand more effort devoted to the training of salesmen.

In many cases--either in anticipation of this problem or as a consequence of it--the alternative has been to assign the sales training responsibility to a full-time specialist who functions in either a line or staff capacity. Vizza reports that of the members of the National Society of Sales Training Executives, thirty percent report to a marketing director.⁷ The increased use of sales-training specialists may explain why only 11.1 percent of top executives in one study of eighteen firms reported sales training as a requirement of the field sales manager's activity.⁸

The training of salesmen customarily includes such areas as company orientation, market orientation, product knowledge, selling techniques, and field work planning.⁹

⁷Robert F. Vizza, editor, *The New Handbook of Sales Training* (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1967), p. vi.

⁸Z. William Koby, "An Analysis of the Functions of First-Line Sales Supervisors" (unpublished Ph.D. dissertation, The University of Texas, 1966), p. 38.

⁹MacDonald and Bailey, "Training Company Salesmen," p. 8.

According to the National Industrial Conference Board's 1967 report, the average company's training program devoted forty percent of its time to product knowledge, twenty percent to sales techniques, twenty percent to market orientation, and ten percent to company orientation.¹⁰ The self-management of field-work planning has been included as part of company orientation.

In 1966, R. A. Scott concluded that the cost of training the average salesman was over \$9,700.¹¹ If the cost of the average sales call was \$18.92 in 1960 and \$41.07 in 1970,¹² we may estimate today's cost of training a salesman at over \$11,000. Despite such investment, however, there seems to be a growing recognition that the importance of training salesmen does not command the attention it should.

It has been observed that "the real weak link in the sales chain is simply sales training."¹³ R. T. Hise

¹⁰*Ibid.*

¹¹Richard A. Scott, "Costs of Sales Training," *Training and Development Journal*, Vol. 20, No. 5 (May, 1966), p. 4.

¹²Robert F. Vizza, "Managing Time and Territories for Maximum Sales Success," *Sales Management*, July 15, 1971, p. 31.

¹³William R. Sears, "Sales Conditioning in the Corporate Climate," *Sales Management: Contemporary Perspectives*, (Glenview, Ill.: Scott, Foresman and Co., 1970), p. 381.

states that sales training programs are "artificial."¹⁴ Pruden feels they tend to be unrealistic.¹⁵ Product knowledge, as a case in point, occupies a dominant portion of sales training programs (as noted above); training in selling skills, however, is "still a neglected part of sales training, according to Wotruba."¹⁶ The neglect of sales training is probably due to "its subtle, long-range impact on sales volume," according to Davis and Webster.¹⁷ They claim the importance of sales training is not recognized sufficiently and that those who perform it are not rewarded accordingly.¹⁸

Sales training once consisted largely of some product knowledge, rote presentations, practice demonstrations with other salesmen, and sales calls with the sales manager. The trial-and-error process of field-exposure learning was expected to accomplish what the other did not. In education, educational psychology and

¹⁴Richard T. Hise, "Conflict in the Salesman's Role," *University of Washington Business Review*, Winter, 1968, p. 51.

¹⁵Henry O. Pruden, "The Outside Salesman: Inter-Organizational Link," *California Management Review*, Vol. XII, No. 2 (Winter), p. 65.

¹⁶Wotruba, *Sales Management*, p. 370.

¹⁷Kenneth R. Davis and Frederick E. Webster, Jr., *Readings in Sales Force Management* (New York: The Ronald Press Company, 1968), p. 339.

¹⁸Kenneth R. Davis and Frederick E. Webster, Jr., *Sales Force Management* (New York: The Ronald Press Company, 1968), p. 59.

social psychology, however, developments have made available opportunities to improve the training of salesmen.

The classical approaches to training have employed lectures, movies, film-slides, textbook assignments, and field coaching. These can now be replaced or supplemented with simulation, role-playing, incident-process, sales management games, unstructured discussion and programmed instruction, augmented by the use of video-tape recorders, cassette tape-recorders, and improved view-graph projectors.¹⁹

The sales training task, then, varies according to the particular circumstances and environment in which the firm functions. Like the selling function itself, it is not a "single, homogeneous activity,"²⁰ and the nature and content of a given sales training program tends to reflect the internal and external attributes and variables with which the firm copes throughout its marketing effort.

Background and Need for the Study

Outside the specific realm of the sales training literature itself, two themes have emerged which seem to suggest a heightened significance for sales training today. One, that of small-group theory in social psychology

¹⁹Malcolm W. Warren, *Training for Results* (Reading, Massachusetts: Addison-Wesley Company, 1969), p. 71.

²⁰Robert N. McMurry and James S. Arnold, *How to Build a Dynamic Sales Organization* (New York: McGraw-Hill Book Company, 1968), p. ix.

establishes the particular character of such groups. Size is from two in number up to something less than twenty, and the members "must consider the contact meaningful."²¹ They must have somewhat regular "face-to-face" relations²² in their pursuit of commonly accepted goals; they are characterized by their cohesiveness.

Such groups function under conditions of "mutual interdependence"²³ and within an operative "interaction-system" which, as Likert states, is "required for high performance."²⁴

Organizations and their sales managers think of their field sales forces as "groups." This is reinforced in the literature of sales management by such observations that "insight might be secured on salesmen's performance by orienting study around the selling group,"²⁵ and that the sales group is a "logical medium through which effective supervision can be channeled. . . (it) is provided

²¹Theodore M. Mills, *The Sociology of Small Groups* (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1967), p. 2.

²²Bernard Berelson and Gary A. Steiner, *Human Behavior: An Inventory of Scientific Findings* (New York: Harcourt, Brace and World, Inc., 1964), p. 325.

²³Howard F. Taylor, *Balance in Small Groups* (New York: Van Nostrand Reinhold Company, 1970), pp. 9-10.

²⁴Rensis Likert, *The Human Organization: Its Management and Value* (New York: McGraw-Hill Book Company, Inc., 1967), p. 70.

²⁵J. G. Hauk, "Research in Personal Selling," *Science in Marketing*, George Schwartz (ed.), (New York: John Wiley and Sons, Inc., 1965), p. 245.

by salesmen interacting with each other and sometimes with their superior."²⁶

Findings in the study of field sales forces might be better understood and utilized if it is known whether the field sales group is, in fact, a group. Sales groups, in terms of size, can be considered small groups, but where the other characteristics are diminished or absent, performance otherwise prompted by allegiance to group and company goals will be correspondingly affected. It seems that a thoughtful and comprehensive approach to sales training can modify such consequences.

Another theme that has emerged occurs in literature pertinent to sales force management, and might be termed "The Existential Salesman." It is an emphatic counterpoint to a theme of earlier origin, that of the field salesman as the cool, poised, pragmatic "professional."

What it actually means to be a salesman was suggested by Howton and Rosenberg: that the salesman works alone and "typically in foreign territory. . .no team to back him up. . .his performance borne by his isolated, unsupported self."²⁷ Pruden later stated that not only is the salesman without "social support," but he is

²⁶Wotruba, *Sales Management*, p. 446.

²⁷William F. Howton and B. Rosenberg, "The Salesman: Ideology and Self-Imagery in a Prototypical Occupation," *Social Research*, Vol. 32, No. 3 (Autumn), p. 298.

"caught between the discrepant demands of various groups with whom he interacts and over whom he has little control."²⁸ He is a man-in-the-middle, "one story for the customer and another for his company." This is related to the idea that the salesman may be a "marginal man:"²⁹

(The) conflicts between actual group membership and reference groups with whom the individual chooses to identify may leave the individual without any clear-cut and coherent affiliations . . . the norms of his reference groups and those of his actual group (may) conflict . . . a marginal man may also be between identifying with two different groups, achieving a partial identification with each, because he is able to identify with only certain characteristics of either group.

This marginality is directly related to the salesman's freedom; such freedom is a "function of his marginal position between two masters, each having a claim on the salesman's loyalty, and the two claims often competing with one another."³⁰ The observation has been made that such training as salesmen receive "fails to prepare the novitiate salesman for the conflict to which he will eventually be subjected."³¹ Pruden affirms the idea that the isolated position of the salesman induces pressures on

²⁸Pruden, "The Outside Salesman," p. 64.

²⁹J. Douglas, George A. Field, and L. X. Tarpey, *Human Behavior in Marketing* (Columbus, Ohio: Charles E. Merrill Books, Inc., 1967), p. 195.

³⁰Gerhard Ditz, "Status Problems of the Salesman," *Business Topics* (Michigan State University), Vol. 15, No. 1 (Winter), p. 74.

³¹Hise, "Conflict in the Salesman's Role," p. 51.

him that his training program should anticipate.³²

It seems, then, that the approach to sales training should reflect a grasp of the unique nature of the selling "group" and of the isolated, ambivalent position of the man in the field. It would enable a perceptive, sympathetic and knowledgeable kind of purposeful teaching to occur.

Considering the sales training literature itself, there are indications that, historically and currently, there may be a gap between theories and recommendations regarding sales training and the on-going practice of that function. This conditional statement is made because the literature falls into three groups: normative, specifically descriptive, and empirically incomplete.

The overwhelming preponderance of literature on the subject of sales training is normative: how sales training programs should be constructed, what the content of such programs should be, what attributes and qualifications sales trainers and sales training directors should have, what pitfalls should be avoided, what the relative merits of various sales training aids are, and like recommendations. Marketing organizations are frequently encouraged to have training programs for sales managers, for experienced salesmen, and for sales trainers.

³²Pruden, "The Outside Salesman," p. 65.

The specifically descriptive literature details the experiences of particular firms with regard to a certain sales training method, technique, aid, or overall training design. These are instructive for their purposes but do not provide a comprehensive statement representing the field at large.

Where other work has sought to be of an expository, empirical nature, it has focused on sales training programs per se, or on those in a particular industry; some have had an intensive focus within no more than a few firms. On the other hand, the 1967 NICB study of sales training programs derived its information from senior marketing executives and centered on the general characteristics of sales training programs in certain industries.

No studies of the sales trainer himself appear to be extant, much less reports of the sales training task as such trainers perceive them to be. This lacuna is not confined to sales training, evidently, for McGehee and Thayer suggest a broader scope:

Complete and accurate data as to who actually performs the tasks which constitute industrial training are not available. Surveys of the National Industrial Conference Board over a period of some twenty years have shown a trend toward centralizing the responsibility for training in a department usually called "The Training Department." These surveys, however, give little data as to whether or not members of this department or other individuals in

the companies actually do the teaching of employees.³³

In the face of this structure in the literature, a work is needed that will provide information as to what the sales training task tends to be in actual practice, and what the qualifications of sales trainers actually are. This, ideally speaking, should be obtained from those who perform those tasks and have those qualifications. Such a work, of its nature, overlaps with certain related studies in some respects. But it can provide a basis for observing whatever divergences exist between normative prescriptions and actual conditions.

Statement of the Problem

The purpose of this study was to investigate the task of the full-time sales trainer and to delineate both its more dominant features and the qualifications the trainer brings to the performance of that task. A further intent was to expose such aspects of the work of the sales trainer that certain hypotheses could be formulated relative to the future execution of the sales training responsibility.

The objective of this study was not to evaluate the performance of the sales trainer, but to provide

³³William McGehee and Paul W. Thayer, *Training in Business and Industry* (New York: John Wiley and Sons, Inc., 1961), p. 225.

substance for asserting what that performance tends to be in actual practice; to reveal what sales trainers, in fact, do. It has been pointed out by Kerlinger that, before the desirable aim of hypothesis-testing through research can be achieved, many investigations must often be undertaken.³⁴ This investigation, as such an "exploratory field study," hopefully "discover(s) significant variables in the field situation."³⁵

This study seeks, among other things, the extent of line or staff functioning for sales trainers, for example, and also, the degree of activity of sales trainers as either in-plant or field trainers. Hypotheses regarding these and other dimensions of the sales trainer's task are developed from this study and may be tested in further research.

Limitations

This study was limited to those sales trainers recommended by members of the Sales Training Division of the American Society of Training and Development. It was confined to include only those who are "in-house" trainers:

³⁴Fred M. Kerlinger, *Foundations of Behavioral Research* (New York: Holt, Rinehart, and Winston, Inc., 1964), p. 388.

³⁵L. Festinger and D. Katz, *Research Methods in the Behavioral Sciences* (New York: Holt, Rinehart, and Winston, Inc., 1958), p. 76.

specialists who as employees train their companies' salesmen. The information obtained by use of a mail questionnaire was concerned with those members whose full-time function is with regard to sales training. This excludes, of course, those members who are line sales executives for whom sales training is only part of their broader responsibility.

An inherent limitation existed, of course, in confining this study to the members of the ASTD, as it is not known to what extent this membership is representative of the entire universe of all sales trainers. The number of responses, however, was expected to be large enough such that, where findings correlate closely enough for all sizes and types of firms involved, some meaningful implications might be drawn.

A further limitation with regard to this study was the expected heterogeneity in the delineation of the sales trainer and his work. This was expected to be a reflection of the unique situation in which each firm in its marketing effort finds itself. In addition to the matter of size, the approach to the training of salesmen will differ as a consequence of diversity in products and services, market positions, competitive responses, financial strength and management philosophy. In a study of sales training programs, however, Adams concluded that

such divergence is not great.³⁶ There are, also, intangible, internal forces within each firm which may not be evident to the observer and which cannot be interpreted outside the environment of actual operations.

Definition of Terms

Terms of a specific significance which were used in the study are defined in the following statements:

Sales Training -- The activity of training field sales personnel for their personal selling functions.

In-Plant Sales Training -- The activity of training field salesmen at branch, regional, or home offices, wherein the trainees function apart from actual working conditions.

Field Sales Training -- The activity of training field salesmen in an environment consisting of actual working conditions; "in the field," as it were.

Sales Trainer -- A full-time employee engaged in the day-to-day activity of performing all that pertains to the training of his company's salesmen, customarily on a face-to-face basis.

Line Sales Trainer -- A sales trainer who is a member of a line sales-operations group; his superior is a line sales or marketing executive.

³⁶Lilliam Loyce Adams, "A Study of Sales Training Programs in Eighty-Eight Firms," (unpublished Ph.D. dissertation, The University of Texas, 1959).

Staff Sales Trainer -- A sales trainer who is a member of a staff of training and/or personnel specialists. His superior is the designated manager or director of that staff's function.

Superiors of Sales Trainers -- The man to whom the sales trainer reports will be designated the "superior" in this report. It is expected that the actual title varies somewhat, and that variety will be reported in this study.

Salesmen -- Persons whose main activity and responsibility is in the field, creating, exploiting, modifying, and maintaining a face-to-face, communicative relationship³⁷ with customers--i.e., personal selling; also referred to as an "outside" salesman.

Sales Manager -- The first-line field sales executive to whom the field salesmen report, and who has the responsibility for the general, effective performance of those salesmen.

Organization of the Study

Chapter I includes: an introduction to the subject under investigation; a review of the background; an exposition on the need for the study; a statement of the purpose and objectives of the research; a discussion of the scope

³⁷Patrick J. Robinson and Bent Stidsen, *Personal Selling in a Modern Perspective* (Boston, Massachusetts: Allyn and Bacon, Inc., 1967), p. 14.

and limitations; definitions, and a general preview of the organization of the study. Chapter II contains a review of the literature relevant to the study, particularly the related studies of sales training. In Chapter III is described the method and procedure employed in the investigation. Chapter IV includes the findings and statistical data of the study, with analysis and interpretation. A summary of this exploratory study is provided in Chapter V. Hypotheses developed from this research are suggested, and conclusions and recommendations are stated.

CHAPTER II

REVIEW OF RELATED RESEARCH

In the preceding chapter, recognition and definition of the problem were discussed. In this section, consideration will be given to material which has relevance to the present research.

The examination of related research was not as productive as, for example, that concerning salesmen or sales managers would be. This apparent dearth of research pertaining to the one who performs the task of training salesmen is one of the reasons this study was undertaken. The following references, however, supplied background information and helped reaffirm the need for the present study.

The related studies dealing with sales training have the common characteristic of being concerned primarily with sales training programs per se: in a company, in a number of companies, in an industry, or in a number of industries. The sources of information have been salesmen, sales managers, and senior marketing executives. The full-time sales trainer does not appear to have been

consulted, and research on this sales trainer seems to have no precedent in the literature. This can in part be attributed to the influence of the earlier state of affairs in which a production-orientation dominated the economy, non-price competition did not include sales training, and the sales manager had virtually the entire job of training salesmen. Also, sales managers and salesmen, functioning in relatively high-profile occupations, provide a degree of visibility that could be expected to draw the attention of researchers. Sales trainers, by comparison, lack such visibility and it is the sales training programs in which they perform that have undergone the scrutiny of research.

In 1966, Richard A. Scott completed a study of the costs of sales training. Both accountable, "out-of-pocket" costs and imputed costs related to sales training were under study. The author used a mail questionnaire to survey 121 manufacturing firms in nine selected industries.¹ Questions were also directed to the respondent firms' policies and practices regarding sales training.

Information on field and non-field sales training activities was studied, as well as that with regard to trainees with and without some prior selling experience.

¹Richard A. Scott, "Costs of Sales Training," p. 3.

The bases for the estimates of out-of-pocket outlays and the imputed costs were derived from the responses provided by the participating manufacturers on their estimated costs, the periods of time involved, and the nature of their training programs.

Scott calculated that it costs a firm \$9,700 to train an inexperienced man, while the trainee with some sales experience tends to have an average cost of \$6,200. The cost is almost \$8,000 per man if prior sales experience is disregarded and the estimated-outlays data is aggregated.²

It was the author's conclusion that this \$8,000 expenditure would be of concern to management, but that this is only part of all costs, because the imputed costs also include lost revenue. He stated that improvements in training methods and in recruiting and selection procedures should be developed to facilitate better control of sales training costs.³

Scott noted that it was the post-formal training period that involved substantial costs for the firm. He recommended improvements to shorten this period, an intensification of sales training, and an increased effort on the part of management to retain its established sales personnel.

²*Ibid.*, p. 4.

³*Ibid.*, p. 8.

In writing "Sales Training: The State of the Art,"⁴ Richard A. Scott drew on the data obtained in the 1966 study of the sales training programs of 121 manufacturing companies.⁵ This report, however, emphasizes variety of methods employed and duration of formal training. One fourth of the respondents indicated that they did not have formal training programs for their salesmen.⁶ Scott noted that as the size of the sales force increased, the extent or frequency of use of each of the various training methods also tended to increase.⁷

The medium sized firms, those training eleven to 100 salesmen, tended to rely mostly on on-the-job training. The regular, established salesmen in all firms, however, were provided on-the-job training the least; sales meetings or conventions, and bulletins-newsletters, tended to be the most frequent means of training this category of salesman.

The data revealed that, overall, sales meetings, demonstrations, sales manuals, on-the-job training, question-

⁴Richard A. Scott, "Sales Training: The State of the Art," *Sales/Marketing Today*, November, 1967, pp. 8-11.

⁵Scott, "Costs of Sales Training."

⁶Scott, "Sales Training: The State of the Art," p. 11.

⁷*Ibid.*, p. 8.

answer sessions and bulletin-newsletters were the most frequently employed techniques. Among the firms studied, programmed learning devices and formal school classes were the least utilized methods.⁸

The inexperienced trainees, it was found, tended to spend approximately six months in training before receiving field responsibilities; the trainees with sales experience averaged four and one-half months in such training, while established salesmen spend two or three weeks in some formal training.⁹

By way of conclusion, the author observes that there were many dissimilarities among company practices within a specific industry. The practices also varied with the size of the firm and with the nature of the sales personnel being trained.¹⁰ The foregoing estimations, therefore, should be interpreted with such diversity in mind.

In 1967, the National Industrial Conference Board added to its "Experiences in Marketing Management" series a report titled, "Training Company Salesmen;"¹¹ it is primarily a study of sales training programs by industries. The findings were derived from a mail survey taken among

⁸*Ibid.*, p. 9.

⁹*Ibid.*, p. 10.

¹⁰*Ibid.*, p. 11.

¹¹MacDonald and Bailey, "Training Company Salesmen."

members of the Board who were senior marketing executives. Two hundred seventy-six companies' sales training practices were described to the researchers, Morgan B. MacDonald, Jr. and Earl L. Bailey.

The first point of interest in the study was that the median projected increase in the size of the sales force over the ensuing five years was expected to be 25 percent.¹² Virtually all the participating companies claimed to have formal training programs for salesmen. Of 150 firms with divisions, 68 percent assign the sales training responsibility to the divisions, 29 percent assign it to corporate headquarters, and three percent split the responsibility between these two.¹³

Of the respondents, 84 percent rely on their sales or marketing organizations to handle sales training. Over 60 percent of these specify the line sales or senior marketing executive to shoulder this responsibility.¹⁴

The median period of training for inexperienced sales trainees was calculated to be six months, with a range, however, of one week to 60 months; 164 firms

¹²*Ibid.*, p. 2.

¹³*Ibid.*, p. 5.

¹⁴*Ibid.*, p. 6.

reported to have formal training programs with fixed durations.¹⁵ In general, the respondent companies' programs tended to have the greatest emphasis in product knowledge and product applications; selling techniques ranked second and company information third.¹⁶

On-the-job training was employed by almost all of the companies involved in the study; many also relied on some formal training which included classroom work, seminars and home-study. The most widely used methods for the retraining of experienced salesmen were the sales meeting and the special course.¹⁷

The respondents also identified the bases for their increased concern regarding sales training: change, expected growth of the sales force, the need to motivate salesmen, and cost and time.¹⁸

The Sales Training Division of the American Society for Training and Development conducted a survey in an attempt to describe the sales training activities of industrial organizations. A mail questionnaire was the research instrument employed and useable questionnaires were received from 298 companies representing fifteen

¹⁵*Ibid.*, p. 7.

¹⁶*Ibid.*, p. 8.

¹⁷*Ibid.*, p. 14.

¹⁸*Ibid.*, p. 1.

major industrial classifications. The majority of respondents employed less than fifty salesmen, while only three percent employed more than 1,000.¹⁹

The results of this study revealed that the larger the number of salesmen employed, the greater the likelihood that the company offered a formal sales training program.²⁰ Of those firms that worked through distributorships, 78 percent made some type of sales training available; only 41 percent, however, provided distributors with formal training.²¹

The remaining and preponderant part of this survey examined the expenditures devoted to sales training. Thirty-five percent of those firms employing over 200 salesmen committed between \$150,000 and \$80,000 to sales training. By comparison, 56.3 percent of those with ten to twenty-five salesmen provided less than \$10,000 to their sales training budgets.²² Of those respondents who purchased sales training programs, 76 percent indicated they used outside training specialists; 67 percent purchased

¹⁹"ASTD--General Learning Corporation Sales Training Survey," *Sales Training Resources* (Madison, Wisconsin: American Society for Training and Development, 1963).

²⁰*Ibid.*, p. 2.

²¹*Ibid.*, p. 4.

²²*Ibid.*, p. 6.

self-contained programs which were administered by in-house personnel.²³ By way of evaluation, 68 percent of those who purchase outside materials or services considered their use of outside sales training specialists successful and 66 percent planned to use such sources again. A similar percentage, 65 percent, thought the self-contained programs successful.²⁴

The 1953 study by David J. Schwartz, Jr., centered on the sales training program of a large insurance company.²⁵ It was Schwartz's purpose to establish reliable ways of evaluating sales training programs.

With respect to his control-group evaluation, Schwartz concluded that, although the effect of training was evident among trained agents during the first months after training, there was no noteworthy difference in productivity between trained and untrained agents three months after sales training was completed. His findings relative to matching productivity with company quota were that those lines of insurance the agents found easier to sell before the training were the same lines they tended to sell most afterward.

²³*Ibid.*, p. 8.

²⁴*Ibid.*, p. 11.

²⁵David J. Schwartz, Jr., "Selected Methods and Procedures for Evaluating Sales Training" (unpublished Ph.D. dissertation, The Ohio State University, 1953).

Schwartz's third evaluation revealed that the trained agents retained very little of what they had encountered in their sales-training classes, that there was no significant correlation between the test scores of trained agents and their respective sales success in terms of sales volume, and that the agents would need other forms and sources of sales training in addition to the formal, home-office, sales-school type they had received.

The fourth method, the opinion survey, led Schwartz to conclude that the agents' knowledge was not materially increased by the training program and that additional training was needed in prospecting, planning work, and selling life and general liability insurance.

His analysis in the last method was that sales managers needed specialized training, that sales meetings needed better organization, and that instruction on all aspects of the agents' work should be incorporated into the training program.

Despite the useful findings in this work, there were no direct recommendations regarding the qualifications of those who were to do the full-time teaching in the sales training program. If such recommendations did exist, they would seem to have pertinence largely for the company under study and for its industry.

In conducting a survey of the sales training practices of industrial goods manufacturers, Kenneth Lawyer sought to determine the extent to which the selection and training of salesmen were coordinated, the relative achievement required in each subject-matter area, and the teaching methods employed by areas for each class of goods.²⁶ He used a multiple-choice questionnaire and drew his findings from the responses of 258 firms. Each class of goods was represented, as were five size groups.

Lawyer concluded that the selection procedure represented a recognition of the companies' training needs, but that in coping with this phase, most firms did not have an organized approach. He found that product knowledge ranked first in regard to subject-matter emphasis, with knowledge of customer needs holding second place. His findings also revealed that there was only limited planning or timing in the process of developing the sales trainee. The personal needs of the individual trainee were subsumed to what were deemed to be typical or general needs, in arranging the extent and nature of the training experience. Only infrequently was the training well supervised or coordinated.

In terms of quality, it appeared that when the

²⁶Kenneth Lawyer, "A Survey of the Sales Training Practices of Representative Manufacturers of Industrial Goods" (unpublished Ph.D. dissertation, The University of Pittsburgh, 1954).

size of the firm enables the sales training program to be formalized, Lawyer concluded that better planning and supervision occurred, including better attention to the individual needs of the trainee.

Lloyd R. Saltzman sought to examine the sales training programs in companies employing fifty or less salesmen.²⁷ He wished to compare principles and practices followed in the areas of selecting and training salesmen with the recommendations of sales training experts as evidenced by their writings. He had the further purpose of formulating suggestions and recommendations, based on the findings, to those firms which either had no sales training programs or which were experiencing difficulty with existing programs.

Saltzman found that generally the smaller the company the less likely it was that a sales training program existed. His respondents claimed that increased sales volume was both the main objective and the main result of sales training. This was also the criterion for measuring the effectiveness of sales training, thus concurring with the opinion of his panel of sales executives.

The recommendations made in this study were that

²⁷Lloyd R. Saltzman, "Sales Training Programs in Business Concerns with Fifty or Less Salesmen" (unpublished Ph.D. dissertation, The University of Colorado, 1956).

sales executives in smaller companies:

1. Make job and difficulty analysis and consider using sales consultants and batteries of tests as aids in selecting salesmen;
2. Offer both group and individualized training;
3. Obtain help from trade associations and National Sales Executives;
4. Learn to use audio/visual aids, and
5. Train the trainers.

The one comment above regarding sales training is of interest, for throughout the prescriptive, normative literature, there does not appear to be the explicit advice, stated above, that the sales executive should train the sales trainer.²⁸ This recommendation, of course, would require a comparison with what qualifications it was decided a given firm's sales trainer should have, and an

²⁸As examples, the following references may be of interest: National Society of Sales Training Executives, "Selecting and Training the Sales Trainer," *The New Handbook of Sales Training*, R. F. Vizza (ed.), (Englewood Cliffs, New Jersey: Prentice-Hall, Inc., 1969), pp. 63-72; Robert Stone, "Eight-Point Check-List for Sales-Training," *Sales Management*, July 19, 1963, pp. 110-116; E. Patrick McGuire, *Training Sales Engineers* (Mountainside, New Jersey: Padric Publishing Company, 1964); and Thomas R. Wotruba, "Training Sales Personnel," Chapter 11 in *Sales Management: Planning, Accomplishment, and Evaluation* (New York: Holt, Rinehart and Winston, Inc., 1971), pp. 348-388.

examination of what qualifications the sales executive accordingly should possess so as to effectively teach and train the sales trainer.

The study conducted by L. L. Adams was also one concerned with sales training programs. The author's objectives were to describe what the general content of sales training programs tended to be: the sales policies with which sales trainees should become acquainted; the recruitment and selection of salesmen; the induction, orientation, indoctrination, and pay of the trainees; the types of courses given trainees; the methods and devices used in classes; the training procedures employed; and the follow-up on the effectiveness of sales-training programs. The author employed a mail-questionnaire and the findings were based on the responses obtained from eighty-eight firms.²⁹

The content of the sales-training programs, Adams found, provided company information during the induction period, while the sales and sales-training policies were part of the main body of the programs themselves. Most of the author's respondents indicated that they did have formal classroom training and that salesmanship was the most frequently given course.

²⁹Lillian Loyce Adams, "A Study of Sales Training Programs in Eighty-Eight Firms" (unpublished Ph.D. dissertation, The University of Texas, 1959).

Of the methods of training employed, questioning, demonstration, lecture, and guided discussion were those most frequently used. The practice of having trainees work in the field with sales supervisors and other salesmen was reported by all the firms participating in the study.

Virtually all of the firms claimed that their sales training programs were more or less continuous. Following up on the effectiveness of these programs was accomplished by the use of reports, testing, and the comparison of actual sales with sales quotas.

Adams concluded that among the participating companies the variations and differences associated with the uses of certain methods, devices, and procedures, were not great. The variations and differences which did exist were interpreted as related to marketing policy differences, reflecting in turn those differences in products, prices, channels of distribution, customers, and services.

In his study of the sales training conducted in the general aviation industry, researcher Harris was interested in analyzing the manner in which sales training was conducted, the reasons justifying the sales training methods used, and the problems which emerged during the sales training programs.³⁰

³⁰ Clyde Eli Harris, Jr., "A Study of Sales Training in the General Aviation Industry" (unpublished Ph.D. dissertation, The University of Arkansas, 1964).

The conclusions in Harris' work were that salesmen accept training only when they fully understand the benefits; that firms will tend to upgrade the selling profession; that companies should attempt to adhere more closely to the basic fundamentals of the selling process; that sales training, like all education, should be based on the laws of learning; that greater expenditures on sales training seem mandatory; that additional training is needed at the sales-management level; that formal training schools will find it necessary to adhere to a strict time and subject schedule; and that the evaluation of sales training is imperative.

Harris offered six predictions regarding sales training in this industry:

1. Staff positions for sales training would be increased.
2. Continuous training will receive greater emphasis.
3. Programs will become more decentralized.
4. Visual aids and programmed techniques will be used more extensively.
5. Distributing organizations will become more selling-oriented.
6. Future training will be directed more toward distributors than dealers.

Although this research work provided no explicit recommendations regarding the qualifications of sales trainers, two observations of interest can be made in relation to the present study of the sales trainer and his job.

Harris was predicting in 1964 that the number of staff sales trainers would increase. In 1967, Vizza mentioned that over 30 percent of those involved in full-time sales training no longer reported to a sales manager, but to a top marketing executive.³¹

One of the conclusions in this study was that there should be more training conducted in behalf of sales managers. This is a common feeling held by a number of researchers and other observers, and a question regarding the training of sales managers was planned to be included in the research on the sales trainer and his job.

A study of the sales training given industrial distributors' salesmen was made by Harry J. Waters.³² He sought to determine how such salesmen might obtain better preparation, what sources might provide it, and who should supply it. Waters used mail questionnaires to

³¹Vizza, *The New Handbook of Sales Training*, p. xi.

³²Harry Joseph Waters, "An Apprenticeship and Training Program for Industrial Distributor Salesmen" (unpublished Ph.D. dissertation, New York University, 1964).

obtain information from manufacturers of industrial products, distributorship owners or managers, purchasing agents, and industrial distributor salesmen. His purpose here was to determine the educational requirements necessary to meet the customers' needs. Personal field studies were conducted by the author, in which he contacted manufacturers and distributors; he also observed salesmen and purchasing agents in daily work performance.

Author Waters concluded that the sales trainees should have more formal education, considering the complex needs of industrial customers, and that backgrounds in science, engineering, business administration, and liberal arts would be satisfactory. Such training as they receive should occur more often in the manufacturing plants of the respective distributor's major suppliers. The latter, recommended Waters, should assume more responsibility in training distributors' salesmen.

It was also recommended that the sales meetings for these salesmen should be better planned and scheduled with some regularity. These meetings, Waters felt, should be occasions for additional sales training.

Concluding Remarks

In these writings consists the virtual entirety of research work concerned with sales training. As mentioned above, the attention of the writers concentrated

on sales training programs to the exclusion of those who must perform in such programs. It is one of the aims of this study to rectify such exclusion, to at least a modest extent, and to expose to the light of research the sales-training job as it is described by the sales trainer.

Given that the one who has the full-time task of training salesmen is in a pivotal, crucial position, it would seem that the sales organization should have well-defined, clear-cut norms for selecting sales trainers. It should be expected, moreover, that these norms would be founded on reliable, proven bases rather than historic practice or current organizational convenience.

The experience of the sales trainer-candidate can be considered as well as his education, but it is not known to what extent either of these considerations tends to be dominant. There is, of course, the further question of the kind and quality of both work experience and education, and, moreover, what objective justification exists for relying on either of these to whatever extent. This research effort is, in part, a basic starting point in determining what measurable qualifications sales trainers tend to have in terms of work experience and academic preparation. Given this information, one might then investigate to what extent such qualifications can serve as norms for sales training performance.

To say that the job of the sales trainer is training salesmen does not appear to be a sufficiently descriptive statement. The sales trainer may be a staff administrator issuing sales bulletins and memos to field salesmen, a home-office classroom teacher, or a sales-manager surrogate working in the field with salesmen -- or he may be all of these in some proportion at one time or another. His firm's specific situation dictates the dimensions his job tends to assume.

What the sales trainer's job tends to be like is not known. He may function in a line or staff capacity, work primarily in the field or at a training center, deal with salesmen individually, in groups, or both, or, possibly, not at all on a face-to-face basis. In addition, the aspects of his work can be expected to be conditioned by the structure (or non-structure) of his firm's sales training program.

There is, of course, a definitive relationship between the characteristics of the sales training task and the qualifications of those who must execute it. Knowing what that job tends to be like in actual practice provides a framework for those qualifications which sales trainers bring to their work, in whatever way that might be defined. The end of qualifications resides in the task, and where these are defined and justified, the effective training of salesmen obtains a fundamental pillar in its foundation.

CHAPTER III

RESEARCH DESIGN AND METHODOLOGY

Due to the scarcity of secondary data with regard to the actual characteristics of the sales trainer and his job, this study was directed toward the development of primary information sufficiently comprehensive within the bounds set by availability of data and by cost factors.

This research effort, in the first instance, presumed that the function of training salesmen, in any given case, directly reflects the state of affairs with regard to the firm's internal and external environment. Sales trainers perform in virtually all industries, in a great variety of circumstances and conditions.

Thus, beyond the fundamental distinctions wherein line sales executives or independent sales-training consultants have the full sales training responsibility, a broad diversity in trainer qualifications and job-characteristics was expected to be found among the "in-house" company sales trainers.

Despite such expected heterogeneity, however, the study sought to identify significant variables in the

sales training environment. The effort was conceived as one to be directed to those who perform the actual sales training work, thus identifying those variables in either man or job, or both. The greater the number of similarities revealed--allowing for categorical differentiations--the greater the importance the respective variables will assume.

Consistent with the aim of setting forth a reasonably comprehensive profile of the sales trainer and his work, it was felt that the data-gathering effort should draw from as great a variety of sources as was reasonably possible. This necessarily involves sources of great geographic dispersion, thus rendering the personal interview as impracticable, particularly with regard to time and cost factors.

The customary reservations advanced with regard to the use of mail questionnaires were reviewed,¹ and the inherent limitations recognized.² This study, however, warranted such use largely because of the fundamental requirement of obtaining a sales-trainer profile of adequate scope and representativeness.

¹Paul L. Erdos, *Professional Mail Surveys* (New York: McGraw-Hill, Inc., 1970), pp. 10-13, 138-150.

²Mildred Parten, *Surveys, Polls and Samples* (New York: Harper & Brothers, 1950), pp. 391-402.

The evidence for this study, therefore, comes almost entirely from field data in the form of mail questionnaires. This follows the advice of Campbell and Katona who recommend such surveys "when the desired information cannot be obtained more easily and less expensively from other sources."³ Due to the specialized occupational interest of the population under study, a high percentage of response to the mail questionnaire was expected.

Questionnaire Construction

In order to delineate both the qualifications the sales trainer brings to his work and the actual characteristics of such work, it was necessary to divide the research instrument into five sections. This decision was based on interviews with members of the Oklahoma City chapter of the American Society for Training and Development, on consultations with the author's dissertation committee members, Dr. Rodney E. Evans and Dr. Marion C. Phillips, on an inspection of the sales training literature, and on the author's personal familiarity with aspects of the sales training field.

A further useful aid was the definition of a

³A. A. Campbell and George Katona, "The Sample Survey: A Technique for Social Science Research," in L. Festinger and D. Katz, *Research Methods in the Behavioral Sciences* (New York: The Dryden Press, Inc., 1953), p. 16.

"Training Instructor" in the *Dictionary of Occupational*

Titles:

Prepares and conducts in-service training for company personnel, evaluating training needs in order to develop educational materials for improving performance standards. Performs research relating to course preparation and presentation. Compiles data for use in writing manuals, handbooks, and other training aids required for courses. Develops teaching outlines and lesson plans, determines content and duration of courses, and selects appropriate instruction procedures, based on analysis of training requirements of company personnel. Conducts courses in specialized fields such as engineering, scientific subjects, or company administrative procedures and practices. Tests and evaluates progress of employees to determine effectiveness of training methods, materials, and courses. Coaches and trains other workers in vocational training methods."

The questionnaire's five sections posed questions, respectively, as to the respondent's personal data, his company, the sales training program, his sales training job in that program, and some general information. A copy of the questionnaire is included in Appendix I of this report.

The personal data, in section "A" of the research instrument, was expected to reveal the qualifications of the sales trainers responding to the questionnaire. Accordingly, the questions for this section focused on the amount and kind of formal education, the number of years' experience

⁴"Training Instructor," *Dictionary of Occupational Titles*, Third Edition, Vol. 1 (Washington, D. C.: U. S. Government Printing Office, 1965), p. 751.

(in the existing or other firms) as salesman, sales manager, sales trainer, general trainer, and/or teacher in an educational institution. Those who claimed field selling experience were further asked to indicate both what they had sold and the years devoted to such sales experience. The purpose of this question was to identify the relationship between sales experience and present sales training.

In asking the respondent to state the position he held just prior to his present one, the researcher sought to identify more exactly the sources from which the respondents' firms tended to draw their sales trainers, suggesting again a measure of sales-trainer qualification. The last question of this section, that inquiring as to how long the respondent expected to serve as sales trainer, was designed to reflect whether that function tends to be viewed as a career work or as an intermediate, temporary position pending a move to some other management responsibility. This section was also designed to provide some internal checks and to aid in qualifying the relationships between selected responses.

Section "B" concentrated on the respondent's company information. The responses indicating the company's industry would aid in making sales-training differentiations by industry and would facilitate a comparison with the sales experience claimed in section "A."

By obtaining information on number of employees

and dollar-volume of sales, some measure of company size, within its industry, could be ascertained. Since those to whom a company does its selling were expected to influence its sales training efforts, a question regarding types of customers was included in this section.

The third section inquired into a number of aspects of the sales trainer's job. The first two questions were designed to help determine whether the respondent was serving in either a line or staff capacity. He was asked to indicate the title of his superior, whether he had co-trainers and if such peers were involved in non-sales training. A question regarding the number of subordinates conducting sales training was employed so as to qualify the title the respondent claimed in section "A."

Question 3 of this section asked how the sales trainer's work tended to be divided among actual face-to-face training, sales-training support-functions, and administrative tasks. Question 4 asked the respondent to indicate the proportions of his work spent between training in the field or at a home office or training center. Focusing on field sales training, the next question sought to inquire to what extent the sales trainer worked with salesmen individually or in groups.

Question 6 and 7 of this section asked, respectively, if the sales trainees' attitudes received any formal evaluation, and, if the trainer received formal progress reports

once the training phase had ended.

One of the possible residual values of this study is that it may help in forming the bases for selecting those who are to conduct sales training. Question 8 solicited the opinions of the respondents regarding the minimum qualifications they felt sales trainers should have. The responses in each case were expected to be compared with selected qualifications the respondents themselves possessed.

The last question in section "C" was expected to be difficult for the respondent, for it asked him to cite the explicit criteria used to evaluate his work. This expectation was related to the difficulties which seem to inhere in placing qualitative judgment on, for example, the actual teaching work of secondary-school and university educators.

The fourth part of the research instrument, section "D," queried the respondents regarding the sales training programs in which they performed. The questions asked about duration, frequency, trainees' prior work-familiarization, content proportions, size of training classes, types of methods and techniques, and kinds of physical aids and equipment. The last three questions of this section were concerned with follow-up training, separate programs for sales managers, and justification for method selection, respectively.

Section "E" was a brief section containing three questions. The first question sought to find out if the trainees underwent a separate, additional kind of sales training per se, as conducted by their respective sales managers. The second question asked was one which is of growing importance: whether a formal training program existed for those chosen to be sales managers. Lastly, a question was raised as to whether the respondent's company had a program for training sales trainers.

This research instrument was individually pre-tested with a group of subjects who were members of the Oklahoma City chapter of the American Society for Training and Development (ASTD) or who were associates of such members. All pre-testing respondents were professionals working in personnel relations, training, sales training, or sales management, and all understood the purpose of the questionnaire. Their post-testing recommendations resulted in certain format revisions and in removing a number of semantic difficulties.

Sample Selection

The primary population under study was to be the international membership of the Sales Training Division of the ASTD. Part of this membership, however, was expected to consist of sales training directors whose primary activity centered on the design and administration of sales training programs, but who currently conducted little or

no actual face-to-face training of salesmen. It was further expected that these sales training directors would be directing the activities of sales trainers performing the actual teaching and training functions in their respective firms. Since some of the latter were not expected to be part of the membership, an advance correspondence to the known membership was incorporated as part of the research procedure. This was expected to obtain the necessary names and addresses, and to perform the courtesy of informing the respondent's company of the survey to come.

A list of the membership of the Sales Training Division of ASTD was obtained from the Society. The names and addresses of persons and firms in the business of marketing their sales-training consulting services were--where possible--excluded from the advance correspondence. The sum of 575 relevant names and addresses included membership in the Society through January, 1972.

The advance correspondence included the following items--exhibits and copies of which are contained in Appendix I:

1. A letter, separately typed and personally addressed, which informed the addressee of the study, suggested its significance, and requested the names and addresses of sales trainers under his supervision, if any.

These letters were personally signed by Dr. Rodney E. Evans and by the researcher.

2. A printed form, with instructions, on which the addressee could list the names and addresses of the sales trainers in his firm.
3. A return envelope of number nine size, with the new 1972 University of Oklahoma logo imprinted in red, as was the name and return address of the researcher. A red airmail stamp was affixed to each return envelope.
4. A mailing envelope of number ten size, imprinted in red with the traditional seal of the university. Each name and address was individually typed on these envelopes. The entire mailing was done on an air-mail basis, with the exception of those destinations of regional proximity.

This mailing to 575 individuals involved companies marketing a wide range of products and services in various geographic areas. Both Asian and European addresses were represented in the mailing, and there were some company duplications.

The total responses numbered 328, representing 213 different companies and providing 430 usable names and addresses. The size of the response to this single mailing reaffirmed the writer's expectation regarding the

anticipated response from the ultimate sales-trainer population to be surveyed. It also tended to justify the stress placed on the exploitation of all promotional aspects that might increase the level of response.

Questionnaire Administration

According to Erdos,⁵ a fifty percent response to mail surveys is the general minimum level that should ordinarily be accepted. The technical preparation of the questionnaire was dominated, therefore, by the goal of obtaining a high level of response to the research effort.

Thus, it was determined that, without foregoing necessary information, it should be 8 inches by 11 inches in size, and limited to four pages in length. Great stress was placed on ease of response: most questions were designed to require very brief responses--a number, a word, a title, or, choices indicated by appropriate check-marks. Where possible, the response-area was localized near or in the right margin of each page. Of the thirty-six primary questions in the questionnaire, only two were open-ended.

It should also be noted that size of print, color and texture of the paper, and use of space, came under the requirement of obtaining a high response-level.

⁵Erdos, *Professional Mail Surveys*, p. 144.

The process of printing the questionnaires included the imprinting of a four-digit code-number on the lower right-hand corner of the fourth page. The accompanying letter, which stressed the confidential handling of the respondent's answers, was separately typed and addressed. A by-product of the typing process was a printed list of all addressees, and the respective code was entered for each addressee. This was necessary in order to facilitate the follow-up mailing to the initial non-respondents. A cross-referencing numerical code-sequence was also drawn up to assist any later reference to either name or code-number.

Assurance of confidentiality tends to reduce the respondent's concern over a printed code-number on a questionnaire, Parten suggests;⁶ of all the returns which later arrived, no written comment regarding the code-number was made. One respondent, however, removed the code-number with a scissors, and assured the arrival of a second questionnaire.

The mailings to the 430 sales trainers were effected in the same manner as that of the advance correspondence, each package consisting of a folded questionnaire, an accompanying letter, and a number nine return envelope, self-addressed to the researcher, and airmail-stamped, all of

⁶Parten, *Surveys, Polls and Samples*, pp. 400-401.

which were enclosed in a number ten envelope. All mailings were again sent airmail, excepting those to geographically proximate addresses. This initial mailing was completed in five days. Approximately four weeks later, duplicate packages were air-mailed to the non-respondents to the initial mailing. Inasmuch as a total response of over seventy percent was sought, the response to this mailing was expected to determine the extent of the telephone follow-up which had been specified in the research plan.

After approximately two and one-half weeks, the volume of response indicated that telephone calls need be made only to several non-respondent sources. Four were chosen, in particular because each represented firms employing more than one addressee. Each telephone call concluded with the respondent's promise of an immediate return of the completed questionnaire. With the arrival of these, the field data-gathering phase of the study was completed; it had covered a period of approximately eight weeks.

Seven of the questionnaires were returned without having been completed. In each of these cases, the addressee was no longer acting in the sales training capacity; he had been transferred or promoted, or had terminated, and his successor either was not known or had not yet been appointed. One addressee stated that sales training was now handled by outside consultants, and one was deceased.

Table I provides a numerical analysis and distribution regarding the mailings and the subsequent returns from the field. Table II reflects the sources from which the responses came, indicating the category of the title claimed by respective respondents; the number of respondents in such categories, and the corresponding percentages.

Statistical Treatment

The responses on all usable questionnaires were edited and coded, in preparation for key-punching onto data cards, and the raw data was then tabulated so as to facilitate internal comparison.

The study was of the nature of an exploratory field study, and, as such, partakes of the nature of "taxonomic research," the purpose of which is "discovering, classifying, and measuring natural phenomena."⁷ In the attempt to identify variables, the fundamental analysis was therefore to take the form of "statistical description."⁸ The summarizing measures were developed in terms of frequencies, relative frequencies (percentages), measures of central tendency and of dispersion, where applicable.

⁷Kerlinger, *Foundations of Behavioral Research*, p. 291.

⁸C. A. Moser, *Survey Methods in Social Investigation* (London, England: William Heinemann, Ltd., 1958), p. 289.

TABLE I

QUESTIONNAIRE MAILING AND RESPONSE DATA

<u>Mailing</u>		
Adjusted* Total	430	
 <u>Returns</u>		
	<u>Amount</u>	<u>Percent</u>
Response to First Mailing	228	53.02
Response to Follow-up Mailing	70	16.28
Response to Telephone Follow-up	<u>4</u>	<u>0.93</u>
Return Totals	302	70.23**
Less: Unusable Returns	<u>7</u>	
Net Returns	295	

* Adjusted for Post Office Returns and for errors in coding.

** Difference in hundredths is due to rounding.

TABLE II

SOURCES OF RESPONSES BY CATEGORY OF TITLE

<u>Category</u>	<u>Amount</u>	<u>Percent</u>
Sales Trainer	145	49.15
Sales Training Manager	115	38.98
General Trainer	9	3.05
General Training Manager	8	2.71
Other (non-training)	<u>18</u>	<u>6.10</u>
	295	99.99*

*Difference in hundredths is due to rounding.

It was expected that some relationships of interest would exist in the data. In such cases, the information was brought together in tabular form for purposes of comparison. In addition, certain aspects pertaining to both the work of the sales trainer and to his qualifications were presented in paragraphic form in order to suggest implications which might not be immediately evident to the reader.

CHAPTER IV

ANALYSIS AND INTERPRETATION OF THE DATA

The purpose of this chapter is to present the data obtained from the survey to which 295 sales trainers responded. This presentation is accompanied by an analysis of the findings, and interpretations are offered particularly with regard to relationships within the entire body of data. The presentation is set forth in the pattern of the topic-sequence employed in the research instrument. The data are presented in comprehensive form, i.e., a total representation of all responding sales trainers. The data have been arranged in tabular form by selected industries, and may be reviewed in Appendix II.

Personal Data

In the questionnaire, this section was labeled "About You." It concentrated on the respondent's particular qualifications in terms of education and work-experience.

Education

Among the 295 respondents, 256, or 86.8 percent,

reported they had university backgrounds. This number of respondents can be analyzed on the basis of groups: 256 who indicated they had experienced undergraduate programs, and ninety-five of these who stated they had participated in graduate studies. Tables 3 and 4, respectively, set forth this information. In terms of level of education, it appears that this group of respondents has come to the sales training task with a high incidence of intellectual preparation, particularly insofar as 32.2 percent are or have been involved in graduate studies.

The particular fields of study in which the respondents reported they were involved are exhibited in Tables 3 and 4; the tables pertain to the major field of study in undergraduate and graduate programs, respectively. There seems here to be another indicator of preparation. Of special note is the 13.3 percent of respondents who have had Marketing as a major field of undergraduate study. Combined with the Management/Business-Administration group, the representation appears substantial. Adding both the Economics-Finance category (7.4 percent) and the Accounting group brings the proportion of sales trainers here having backgrounds in undergraduate business studies to 48.8 percent. Whether this dominant representation is conducive to a superior sales-training performance is not, of course, known at this time, and its description here

TABLE 3

MAJOR FIELDS OF COLLEGE UNDERGRADUATE STUDY
OF RESPONDENTS

Major Fields of Study	Number Reporting*	Percent
Marketing	34	13.3
Management, Business Administration	63	24.6
Economics, Finance	19	7.4
Education, Guidance/Counselling	33	12.9
Psychology, Sociology	15	5.9
Political Science, History	24	9.4
Engineering	22	8.6
Accounting	9	3.5
Other (Physical Sciences, Mathematics, Languages, Philosophy, Fine Arts)	37	14.5
TOTAL	256	100.1**

*Thirty-nine respondents did not complete this portion.

**Difference in hundredths is due to rounding.

TABLE 4

MAJOR FIELDS OF GRADUATE STUDY
AMONG RESPONDENTS

Major Fields of Study	Number Reporting*	Percent of Those Reporting
Marketing	6	6.3
Management, Business Adminis- tration	28	29.5
Economics, Finance	6	6.3
Education, Guidance/Counselling	28	29.5
Psychology, Sociology	10	10.5
Political Science, History, Law	5	5.3
Engineering	2	2.1
Other (Physical Sciences, Mathe- matics, Languages, Philo- sophy, Fine Arts)	10	10.5
TOTAL	95	100.0

*In this portion, no response was made by 200 respondents.

is not intended to suggest that size of representation is some function of wisdom in planning the training of salesmen.

Those who have had Education as a major field of undergraduate study are well represented at a level of 12.90 percent. Since training can be construed to be the vocational expression of the teaching profession, this representation also appears to be consonant with the aims of sales training. That is, the trainer's familiarity with learning principles, teaching techniques, and program design and execution, is a positive constituent in the development of effective sales personnel.

A number of respondents evidenced undergraduate major study in Engineering, Physical and Natural Sciences, Mathematics and other fields which might not, of themselves, suggest a direct tie to the sales training function. Many firms, however, are marketing products of a complex or abstruse nature to customers who, in many instances, expect salesmen to be technically conversant. The selling of computers, pharmaceuticals, electronic components, and animal feeds, as examples, springs quickly to mind. If one employs the marketing concept--at least in its most rudimentary sense--having sales trainers with the appropriate technical education is a welcome imperative.

In the realm of graduate studies, Education and Business studies (all disciplines) predominate to a much

greater extent. Together they comprise 71.6 percent of the representation, with all Business Studies totaling 42.1 percent, and Education at 29.5 percent. One item of interest is that, of the thirty-three respondents who claimed Education as an undergraduate major field of study, twenty-eight (84.8 percent) also indicated in the "Work Experience" portion of the questionnaire a year or more of teaching experience as a member of the faculty of an educational institution. And, of the twenty-eight respondents indicating graduate studies in Education, twenty-seven (96.4 percent) reported such teaching experience. All of these, except one, indicated two or more years as a teacher.

Work Experience

The respondents reported on their work experience with respect to years spent as field salesman, field sales manager, sales trainer, and/or teacher at an educational institution. The years stated were categorized by the respondents in terms of experience with both the present and former employers.

Table 5 shows the measures of central tendency (means and medians) derived from the kind of information available in Table 6. The latter, however, has summed the respective years of experience, while Table 5 exhibits the distinction between the respondents' experience with their present employers and that with former employers.

TABLE 5

MEAN AND MEDIAN NUMBER OF YEARS OF WORK EXPERIENCE
OF ALL RESPONDENTS, IN SELECTED
OCCUPATIONAL POSITIONS

Position Held	Number of Years			
	With Existing Organization		With Former Organizations	
	Mean	Median	Mean	Median
Field Salesman	3.7	3	2.5	0
Field Sales Manager	1.7	0	0.5	0
Sales Trainer	3.5	2	0.5	0
Trainer (Non-Sales)	0.7	0	0.7	0
Teacher (Educational Institution)			1.1	0

TABLE 6

NUMBER OF RESPONDENTS REPORTING YEARS OF EXPERIENCE
IN SELECTED WORK-CATEGORIES

Years of Experience Reported Experience Category	1	2	3	4	5	6	7	8	9	10	11	12 or 13	14 to 16	17 to 19	20 or more	TOTAL
Field Selling	7	29	30	26	39	17	12	12	9	10	11	14	9	9	5	239
Field Sales Management	20	19	19	9	9	6	5	5	5	3	2	10	4	2	0	118
Training (Non-Sales)	19	14	6	2	9	3	5	5	0	2	3	4	1	1	0	74
Teaching (Academic)	17	13	11	5	9	5	1	3	1	1	2	2	0	0	1	71

An examination of Table 6 reveals that field selling experience is most frequently represented by thirty-nine respondents claiming five years as a field salesman. If the range from two to five years is arbitrarily grouped out of this category and the response aggregated, a count of 124 respondents represented is obtained, a proportion of 44.4 percent. The mean number of years as field salesman is reported in Table 5 at 3.7 with present employers and 2.5 with former employers.

The reported years of experience in field sales management appear, by review of Table 6, to be strongly represented at the level of three years or less. Fifty-eight respondents made their indications in this range, constituting 53.7 percent of those claiming sales management experience. Table 5 shows an average of 1.3 years for this group and a median of no years experience.

Performing as a sales trainer is reflected in Table 5 at 3.5 mean years with a median of two years with present employers; a mean of 0.5 years with former employers is shown, the median here being zero.

Those with backgrounds in training personnel other than sales personnel are also included in Table 6. Thirty-three respondents indicated either one or two years in such activity; they comprise 49.1 percent of the seventy-four respondents here. They have shown 0.7 mean years and no median years with present employers, while having 0.7

mean years and no median years with past employers, according to Table 5.

Seventy-one respondents indicated some experience as a teacher at an educational institution. Table 5 indicates the number of years' experience these respondents claimed, respectively. Again, three years or less obtains the larger concentration of respondents, 57.8 percent of this group being counted here. In Table 6 is shown their years in teaching, in terms of an average of 1.1 years with a median at the zero level.

An experience-profile of the sales trainer was drawn up and is exhibited here as Table 7. The four non-sales-training types of experience were brought together to show which combinations the respondents tended to represent. Of note are the eighty-five respondents who have college backgrounds and some experience as trainers of non-sales personnel; they constitute 30.5 percent of those reporting here. Close in representation are those who have experience in field selling and non-sales training, and who have a college preparation. There are seventy-eight with this combination, and their representation is calculated at 28.0 percent.

The third group warranting comment represents 14.3 percent of the respondents in this portion. They have a combination of college preparation and non-sales training and academic teaching experience.

TABLE 7

SALES TRAINER EXPERIENCE-PROFILE

Type of Experience	Frequency of Indication	Percent of Total Indications
Field Selling, Training (Non-Sales), Academic Teaching, and College Preparation	22	7.86
Field Selling, Training (Non-Sales, and Academic Teaching	3	1.08
Field Selling, Training (Non-Sales), and College Preparation	78	27.96
Field Selling, Academic Teaching, and College Preparation	1	.36
Training (Non-Sales), Academic Teaching and College Preparation	40	14.34
Field Selling and Training (Non-Sales) Only	15	5.38
Field Selling and College Preparation Only	3	1.08
Training (Non-Sales) and Academic Teaching Only	7	2.51
Training (Non-Sales) and College Preparation Only	85	30.47
Training (Non-Sales) Only	20	7.16
College Preparation Only	5	1.79
TOTALS	279*	99.99**

*Sixteen respondents did not complete this section.

**Difference in hundredths is due to rounding.

The striking evidence here is that all three of the foregoing sets of respondents have the common experience of both non-sales training and college preparation. And their summed representation here is 203 respondents, i.e., 72.8 percent.

These areas of experience are those selected by the researcher for examination. It is certain there are other areas, as Table 8 indicates. The selected areas of experience, however, are compared with other data in later sections of this chapter.

The positions the respondents held prior to the present sales-training position are set forth in Table 8. Here can be discerned the sources from which firms tend to draw those who are to staff their sales-training positions. Among this group of respondents, eighty-seven came directly from field selling, while ninety-five came directly from various positions in sales management. The sum of these two groups represents 61.7 percent of those reporting. This tends to suggest that the majority of sales organizations prefers that sales trainers be drawn directly from the field sales force.

Among the sales-training themes struck with increasing frequency is that concerned with the matter of providing the sales trainer with formal, thorough-going training for the crucial role in which he must perform. Table 9 is an attempt to indicate to what extent the

TABLE 8

NUMBER OF RESPONDENTS REPORTING POSITION HELD
PRIOR TO PRESENT POSITION

Prior Position Held	Number Reporting	Percent
Salesman, Sales Representative, Etc.	87	29.5
Sales Manager, Sales Supervisor, Assistant Sales Manager	95	32.2
Staff Sales Specialist	14	4.8
Manager, Training Center/ Training School	14	4.8
Sales Trainer	15	5.1
General Trainer/Personnel	16	5.4
Teacher, High School/College	4	1.4
General Management	14	4.8
Other	16	5.4
No Response Indicated	20	6.8
TOTAL REPORTING	295	100.2*

*Difference in hundredths is due to rounding.

TABLE 9

NUMBER OF RESPONDENTS REPORTING HAVING
HAD FORMAL TRAINER PREPARATION

Indication of Preparation	Number Reporting	Percent
Have Had Formal Trainer Preparation	158	53.6
Have Not Had Formal Trainer Preparation	115	39.0
No Response Indicated	22	7.5
TOTAL	295	100.1*

*Difference in hundredths is due to rounding.

respondents have received such training. The affirmative was ventured by 158 respondents or 53.6 percent of all respondents involved in the survey.

Taken at its face value, this extent of formal train-the-trainer preparation may appear somewhat greater than what might have been expected. The researcher's question only sought the fact of whether such training had been experienced by the respondent. Other research might wish to refine the use and implication of the word, "Formal," heeding the differing semantic suggestion in the minds of respondents.

Whether a man is to make sales-training his life's work or use it as a bridge to a general management position may make a difference in the way he may choose to execute his sales-training responsibility, or, at least perhaps in his attitude toward those who rely on the quality of his instruction. In gathering the data to go into the construction of Table 10, a first step was made in exploring this possible dichotomy. The proxy variable used was that of time, and the respondents were asked how long they expected to have served in the sales-training function in their present companies.

TABLE 10

NUMBER OF RESPONDENTS REPORTING ESTIMATES OF TIME
EXPECTED TO HAVE SERVED IN SALES TRAINING
CAPACITY FOR PRESENT EMPLOYER

Estimate Indicated	Number Reporting	Percent
Definite, Brief Duration (Five Years or Less)	135	45.8
Indefinite or Career Duration	143	48.5
No Estimate Provided	17	5.8
TOTAL	295	100.1*

*Difference in hundredths is due to rounding.

The response is somewhat evenly divided: 135 respondents specified a duration of five years or less, and 143 responded in career or at least indefinite terms, a comparison of 45.8 percent to 48.5 percent, respectively. The five-year level was an arbitrary selection made by the researcher for the lack of any other definitive norm.

Company Information

This section of the research document was titled "About Your Company." The responses here told of company industry, size, and category of customers.

Table 11 represents an effort to classify the respondents in terms of general, major industries. The major groups employed were those obtained from the codes of the Standard Industrial Classification (SIC) Index¹ approved by the United States Bureau of the Budget.

An examination of Table 11 reveals a substantial numerical preponderance of representation by respondents in the general manufacturing field: 203 of 295 respondents, a 68.8 percentage. This datum should be of value in qualifying whatever impressions might be drawn from the findings in this study.

¹"Standard Industrial Classification Index," *Poor's Register of Corporations, Directors, and Executives* (New York: Standard and Poor's Corporation, 1972), pp. 1-22.

TABLE 11

CLASSIFICATION OF RESPONDENTS BY RESPECTIVE
GENERAL INDUSTRIES

Standard Industrial Classification (SIC) Category			
Code Range	Major Group	Number Reporting	Percent
0100 to 0999	Agriculture, Forestry, and Fisheries	11	3.7
1000 to 1799	Mining and Contract Construction	1	0.3
1900 to 3999	Manufacturing	203	68.8
4000 to 4999	Transportation, Communication, Electric, Gas, and Sanitary Services	20	6.8
5000 to 5999	Wholesale and Retail Trade	16	5.4
6000 to 6799	Finance, Insurance and Real Estate	30	10.2
7000 to 8999	Services	14	4.7
TOTAL		295	99.9*

* Difference in hundredths is due to rounding.

In addition to the classification outlined above, Table 12 details an array of classification provided by the respondents themselves who identified the category to which they claimed their respective companies belonged. Manufacturers and producers constitute 49.6 percent of this group; the 20.7 percent for the services organizations, when compared with that same classification in Table 11, reflects the more precise specification employed in the SIC index.

In Table 13, a comparative representation is made. Part of the data provided by the responses relative to sales trainer's experience was a description of those products or services the respondents may have sold as field sales personnel. The industry in which the respondents are now conducting sales training was compared with those industries of past experience. The results of this comparison are summed in Table 13. Over two-thirds of the 295 respondents, 201 in number, have field sales experience in the field in which they now train salesmen. Conversely, 31.9 percent do not have such experience.

The basic codes employed in Table 11 were replaced in Table 14 by more specific codes obtained from the Standard Industrial Classification listings. The purpose in constructing Table 14 was twofold: to provide a detailed listing of those particular industries in which the respondents worked, and, to further detail the number of

TABLE 12

CLASSIFICATION OF COMPANIES REPRESENTED
BY RESPONDENTS

Classification	Frequency of Indication*	Percentage of Total Indications
Manufacturer/Producer	230	49.6
Wholesaler	44	9.5
Industrial Distributor	30	6.5
Retail Organization	52	11.2
Services Organization	96	20.7
Other	12	2.6
TOTAL	464	100.1**

*Respondents were advised that more than one classification could be indicated.

**Difference in hundredths is due to rounding.

TABLE 13

NUMBER OF RESPONDENTS REPORTING FIELD SALES
EXPERIENCE IN SAME FIELD AS THAT IN WHICH
THEY NOW CONDUCT SALES TRAINING

Indication of Experience	Number Reporting	Percent
Field Sales Experience in Same Field	201	68.2
Field Sales Experience in Other Fields or No Fields	94	31.9
TOTAL	295	100.1*

*Difference in hundredths is due to rounding.

74
TABLE 14

CLASSIFICATION OF RESPONDENTS BY SPECIFIC INDUSTRIES
AND SALES-TRAINING RELATIONSHIPS

Standard Industrial Classification (SIC)		Field of Sales Training Compared With Field of Sales Experience		
		Number of Respondents		Total Industry Respondents
Code	Industry	Same Field	Not the Same Field	
0100	Agricultural Production	0	1	1
0800	Forestry	0	2	2
1700	Construction, Special Contractors	0	1	1
2000	Food and Kindred Products	17	5	22
2100	Tobacco Manufacturers	0	1	1
2400	Lumber and Wood Products Except Furniture	2	1	3
2500	Furniture and Fixtures	0	2	2
2600	Paper and Allied Products	0	2	2
2700	Printing, Publishing and Allied Industries	2	4	6
2800	Chemical and Allied Products	34	4	38
2900	Petroleum Refining and Related Industries	12	1	13
3000	Rubber and Miscellaneous Plastics Products	7	3	10
3200	Stone, Clay, Glass and Concrete Products	3	1	4
3300	Primary Metal Industries	1	2	3
3400	Fabricated Metal Products, Except Ordnance, Machinery and Transportation Equipment	3	4	7
3500	Machinery Except Electric	55	11	66
3600	Electric Machinery Equipment and Supplies	11	4	15
3700	Transportation Equipment	1	2	3
3800	Professional, Scientific, and Controlling Instruments; Photographic and Optical Goods	4	4	8
3900	Miscellaneous Manufacturing Industries	2	2	4
4000	Railroad Transportation	1	1	2
4200	Motor Freight Transportation and Warehousing	1	0	1
4800	Communication	5	3	8
4900	Electric, Gas and Sanitary Services	5	5	10
5000	Wholesale Trade	5	2	7
5200	Building Materials, Hardware and Farm Equipment Dealers	0	2	2
5300	Retail Trade-General Merchandise	0	5	5
5400	Food Stores	0	1	1
5500	Automotive Dealers	0	2	2
6000	Banking	0	1	1

TABLE 14--Continued

Standard Industrial Classification		Field of Sales Training Compared With Field of Sales Experience		Total Industry Respondents
		Number of Respondents		
Code		Same Field	Not the Same Field	
6100	Credit Agencies Other Than Banks.	1	0	1
6200	Security and Commodity Brokers-Dealers, Exchanges and Services	1	3	4
6300	Insurance Carriers	15	4	19
6400	Insurance Agents, Brokers and Service	0	3	3
6700	Holding and Other Investment Companies	1	2	3
7300	Miscellaneous Business Services	12	3	15
TOTALS OF ALL RESPONDENTS		201	94	

respondents in each of the industries specified who were conducting sales training in the same field in which they have had field sales experience. Those without such identical experience are also indicated.

The data in Table 14 indicate that in industries such as food (code 2000), chemicals (code 2800), rubber (code 3000), machinery (codes 3500 and 3600), insurance (code 6300), and business services (code 7300), the sales

trainers as a group tend to have had sales experience in fields consistent with those in which they conduct sales training. Summed as a group, 81.6 percent (151 of 185 respondents) manifest this consistency. Many of the other industries represented would require a greater number of respondents before observations should be ventured.

With respect to size of company, the mean number of employees indicated by respondents is 30,702, while the median number is 400. Several difficulties attend these findings, for many respondents provided instead the number of salesmen only; a number of other respondents evinced no knowledge of this statistic or left the question unanswered.

The same kind of problem was evident with respect to obtaining the figures regarding the respondent's company sales-volume in dollars. There was, additionally, the not infrequent statement by the respondent that such information was confidential. The mean sales volume amount ascertained, nevertheless, was \$942,224,600; the median sum reported was \$276,207,300.

The respondents were asked to categorize their customers, and the results of this response are set forth in Table 15. Many of the respondents' employers were companies active in a number of markets, and/or at several levels in the channel of distribution. Hence, the total indications made with respect to customer category totaled

TABLE 15
CATEGORIES OF CUSTOMERS OF COMPANIES
REPRESENTED BY RESPONDENTS

Category	Frequency of Indication*	Percentage of Total Indication
Industry, Government, Education	179	29.4
Ultimate Retail Consumers	138	22.7
Wholesale Middlemen	141	23.2
Retail Merchants	150	24.7
TOTAL	608	100.0

*Many respondents made more than one indication.

602. Many respondents felt constrained to make more than one indication, obviously, and the average is 2.1 indications per respondent. The contents of Table 15 reveal that there tends, within this group, to be an even distribution of representation from among the categories of customers cited.

Job Information

The work of the sales trainer involves superiors, peers, and trainees. This portion of the study examined a number of facts bearing on his work activity with respect

to these, and solicited his judgment regarding qualifications for such work, as well as criteria for evaluating it.

The material in Table 16 reflects an effort to discover to what extent sales trainers are represented in line or staff capacities. The titles of the respondents' superiors were construed to be proxy variables by virtue of which the sales trainer himself could generally be classified as in either a line or staff position. Hence, the researcher dichotomized the responses on the basis of whether a line sales/marketing title had been indicated by the respondent. It can be noted that 204 respondents, 69.2 percent of all respondents, specified line sales or marketing titles for their superiors. A separate distribution of these titles is arranged in Table 17.

Although many firms, relative to their size and circumstances, may have one person conducting full-time sales training, it is not uncommon for the sales trainer to have fellow sales trainers acting in identical capacities in the same organization. The mean number of co-trainers reported is 4.6 and the median number is one. At least half the respondents, then, have one trainer-peer.

Considering another aspect, the sales trainer involved in face-to-face training with salesmen may have subordinates conducting sales training. Here the data

TABLE 16

NUMBER OF RESPONDENTS HAVING IMMEDIATE SUPERIORS WITH
SALES/MARKETING OR NON-SALES/NON-MARKETING
FORMAL TITLES

Formal Title of Superior	Number Reporting	Percent
Sales/Marketing	204	69.2
Non-Sales/Non-Marketing	72	24.4
No Title Indicated	19	6.4
TOTAL	295	100.0

TABLE 17

CATEGORIES OF REPORTED TITLES HELD BY
SUPERIORS OF RESPONDENTS

Title Category	Frequency of Indication	Percent of Total Indications
Sales Training Manager	94	31.9
General Training Manager	9	3.1
Marketing Director, Manager, Executive	64	21.7
Sales/Branch Manager	78	26.4
General Management (Non-Training/Personnel, Non-Sales/Marketing)	32	10.8
No Response Indicated	18	6.1
TOTAL	295	100.0

exhibit an average of 3.8 subordinates, accompanied by a median of zero. There are, therefore, no sales-training subordinates for more than half of the 279 respondents replying to this question.

Table 18 concerns itself with those circumstances in which the sales trainer has trainer-peers in his organization who conduct training in areas other than sales, such as production, technical operation, research,

TABLE 18

NUMBER OF RESPONDENTS REPORTING HAVING CO-TRAINERS
WHO CONDUCT NON-SALES TRAINING

Indication of Non-Sales Co-Trainer	Number Reporting	Percent
Have Non-Sales Co-Trainer(s)	140	47.5
Have No Non-Sales Co-Trainer(s)	129	43.7
No Response Indicated	26	8.8
TOTAL	295	100.0

etc. The group of responses is nearly evenly divided between those who have such trainer peers, 140 (47.5 percent), and those who do not, 129 (43.7 percent).

In his work as a teacher and trainer of salesmen, the sales trainer fulfills his function in a manner not

unlike that of the high school or college educator: interaction with students in classes, research and design in behalf of courses and programs, and meetings, conferences, and reports which are largely of an administrative nature.

The respondents were asked to state in what programs their working time was divided among activities similar to those stated above: face-to-face training with salesmen, sales-training support activities, and administrative tasks. In Table 19, the proportions provided by the respondents are arranged in terms of their respective means and medians. Over forty percent of these

TABLE 19

REPRESENTATIVE PROPORTIONS OF WORK ACTIVITIES
REPORTED BY RESPONDENTS

Work Activities	Mean Percent	Median Percent
Face-to-Face Training with Salesmen	40.8	40
Sales-Training Support-Functions: Training Research, Program Construction and/or Revision, Etc.	34.2	30
Administrative Tasks: Reports, Conferences, Etc.	23.3	20

sales trainers' work activities is reported to be in face-to-face training with salesmen; an average proportion of 40.8 is evident here, and the median of 40 is virtually identical here. The mean proportion represented for sales-training support-functions is 34.2 percent; the median proportion is calculated at 30 percent. Administrative tasks seem to occupy a sizeable portion of these sales trainers' work activities: 23.3 percent is the average proportion and 20 percent is the median.

Sales training can be interpreted to mean the experience of the structured program in the classroom. At another time it meant only a relentless learning experience in the field, monitored solely by the field sales manager--as it does today in many cases.

As a rule, however, it is neither of these alone, for frequently the field sales manager takes the training reins once the sales novice moves beyond the classroom. It should not be expected, moreover, that the sales trainer operates only in company classrooms. The increased demands on the field sales manager have made it necessary for the sales trainer to begin conducting sales training in the field, away from the company's home offices or training centers.

The sales trainers participating in this study supplied responses denoting the extent of their training

of salesmen in the field. This information, stated by the respondents in percentage terms, is assembled in Table 20 according to mean and median proportions. The responses given indicate that the average proportion of sales training done in the field is 30.4 percent; the median proportion is 20 percent. Conversely, sales training conducted at training centers or home offices is represented at the mean of 67.3 percent, with a median of 80 percent.

TABLE 20

EXTENT OF SALES TRAINING CONDUCTED IN
THE FIELD BY RESPONDENTS

Location	Mean Percent	Median Percent
Sales Training Conducted in the Field	30.9	20
Sales Training Conducted at Home Office or Training Center	67.3	80

The construction of Table 21 depended on those 251 respondents whose information interpreted in Table 20 indicated they conducted some training in the field. These "field" sales trainers may hold classes and work with groups of salesmen at certain field locations. They may, also, be involved in one-to-one interaction with

TABLE 21

RELATIVE EXTENT OF GROUP OF INDIVIDUAL SALES TRAINING
PERFORMED BY RESPONDENTS PROVIDING
FIELD TRAINING

Group Activity	Mean Percent	Median Percent
Work with Groups of Salesmen	64.3	80
Work with Salesmen Individually	26.2	10

individual salesmen, often being a sales-manager surrogate in making joint calls, advising on customer-analyses and planning sales activities.

In Table 21, the responses indicate a proportion mean of 64.3 percent of activities devoted to working with groups of salesmen. The median of eighty informs that half the respondents specified 80 percent or more committed to groups of salesmen. An average of 26.2 percent pertains to the proportion of field sales training accomplished with individual salesmen. The median proportion is indicated at 10 percent.

One further datum pertinent to field sales training can be provided here. The question occurred to the researcher: do those sales trainers who have more field sales experience (see Tables 5, 7, and 8, above) tend to be those who report a comparatively greater proportion

of their time spent in conducting sales training in the field? Or, stated differently, to what extent does proportion of sales training in the field correlate with number of years of field sales experience?

The measure of correlation employed here was the Pearson product-moment "r" coefficient of correlation, which measures the extent of linear correlation between two continuous variables. It is particularly useful when the number of pairs of observations is relatively large.² The results obtained indicated a coefficient of 0.158. This score is sufficiently close to zero to suggest that, for this group of respondents, the relationship between years of field sales experience and proportion of field sales training is not demonstrated for predictive purposes.

Effective sales training depends on a commitment on the part of management, a thoughtful design of the sales training program, the qualifications of the sales trainer, and the quality of the sales trainees. The process of selecting candidates for the sales training program is instrumental in the success of such a program, and part of that process should be to appraise the sales trainees' attitudes. This appraisal, ideally speaking, should occur with regard to all forms of such training programs, including those for sales managers and sales trainers.

²Delbert C. Miller, *Handbook of Research Design and Social Measurement* (New York: David McKay Co., Inc., 1964), p. 79.

Table 22 indicates the number of reported instances in which there exists the formal evaluation of sales trainees' attitudes at the inception of training. Aside from the twenty-three respondents who made no response

TABLE 22
FORMAL EVALUATION OF ATTITUDES OF SALES TRAINEES
AT INCEPTION OF TRAINING

Practice	Number Reporting	Percent
Formal Evaluation Exists	138	46.8
No Formal Evaluation Exists	134	45.4
No Response Indicated	23	7.8
TOTAL	295	100.0

here, there is an even division reported in the data: 138, or 46.8 percent of the respondents, averred that such an evaluation exists in their companies, while in 134 instances, 45.4 percent, no formal evaluation exists.

The rationale underlying Table 23 was that if the sales trainers were enabled to chart the progress of those who had been under their tutelage, two benefits could result: the feedback would enable revisions in the sales training programs to be introduced, understood, and acted upon by the sales trainers--and at an earlier

TABLE 23

THE RECEIPT OF FORMAL PROGRESS-REPORTS ON TRAINEES
AFTER SALES-TRAINING PHASE IS COMPLETED

Practice	Number Reporting	Percent
Formal Progress-Reports Are Received	141	47.8
Formal Progress-Reports Are Not Received	131	44.4
No Response Indicated	23	7.8
TOTAL	295	100.0

point, and, these trainers would be apprised of the ongoing practical effects of their training efforts. They would gain a particular idea of "how they were doing."

47.8 percent of the respondents, 141 in number, reported that they did receive formal progress-reports after the training phase had been completed, according to Table 23. Once again the group of respondents is nearly evenly divided, for 131 respondents, 44.4 percent, indicate that they receive no formal progress-reports.

The answers to the first primary open-ended question in the research document were tabulated and are arranged in Table 24. The respondents were asked to state in their opinion what minimum qualifications the sales trainer

should have. They made recommendations regarding sales experience, field sales management experience, education, teaching experience, knowledge of the job or products, communicating abilities, knowledge of psychology and human relations, and having empathy, as examples. The sum of all entries made here by all respondents was 843, as totaled in Table 24. The average number of entries per respondent, therefore, was 2.9 entries.

TABLE 24

MINIMUM QUALIFICATIONS THE SALES TRAINER
SHOULD HAVE, AS RECOMMENDED
BY RESPONDENTS

Qualifications Recommended	Frequency of Indication	Percentage of Total Indications
Selling Experience	197	23.4
Sales Management/Management Experience	66	7.8
Ability to Communicate	106	12.6
Teaching/Training Background	65	7.7
Possess Empathy, Ability to Relate	82	9.7
Have Some College Education	102	12.1
Knowledge of the Sales Job	73	8.7
Knowledge of Psychology, Human Relations	48	5.7
Other	104	12.3
TOTAL	843	100.0

Across the range of all suggestions made regarding the qualifications sales trainers should have, sales experience is the dominant recommendation cited. It received mention 197 times, or 23.4 percent of all entries. Being an able communicator appeared 106 times, a representation of 12.6 percent. The respondents cited the requirement of some college education 102 times, 12.1 percent of the total. The researcher grouped those responses which recommended that the sales trainer should possess empathy in the same category with those which recommended that the sales trainer should have the ability to relate to the sales trainees. This category received a count of eighty-two in the responses, representing 9.7 percent of all responses indicated in Table 24.

By way of comparison and analysis, it was decided to match selected qualifications for the sales training job as recommended by this group of respondents with selected qualifications which the respondents themselves possessed. Those qualifications which in this study seemed to lend themselves to quantitative comparison and which, at the same time, were to be described in the first section of this chapter, were selected for analysis. Four qualifications were selected: selling experience, sales management experience, teaching or training experience, and college preparation. These particular categories had been cited by the respondents as qualifications

the sales trainer should have and they received mention 197, sixty-six, sixty-five, and 102 times, respectively.

Table 25 presents a comparison of these selected minimum qualifications stated by the respondents with those same qualifications as if possessed by those same respondents. In short, the effort was to determine to what extent the respondents possessed the very qualifications they recommended.

With respect to selling experience, 181 of the 295 respondents studied in this survey both recommended this qualification and had such experience; they constitute 91.9 percent of those citing the qualification. Sixteen respondents, 8.1 percent of this recommending group, did not report selling experience as part of their own background.

It was in the area of sales management experience that the most noticeable difference between recommending a qualification and possessing it occurred. Sixty-six respondents recommended sales management experience; 45 of these had such experience, while 21 did not--proportions of 68.2 percent compared with 31.8 percent, respectively.

Teaching or training experience occurred in the data as a recommendation sixty-five times. There was considerable concurrence here between the respondents' recommendations and their own qualifications. Sixty-four

TABLE 25
COMPARISON OF SELECTED MINIMUM QUALIFICATIONS RECOMMENDED
BY RESPONDENTS WITH SELECTED QUALIFICATIONS
POSSESSED BY RESPONDENTS

Qualification Recommended	Number of Respondents Recommending	Respondents Possessing Qualification Recommended		Respondents Without Qualification Recommended	
		Number	Percent	Number	Percent
Selling Experience	197	181	91.9	16	8.1
Sales Management Experience	66	45	68.2	22	32.8
Teaching/Training Experience	65	64	98.5	1	1.5
College Experience	102	101	99.0	1	1.0

respondents, 98.5 percent of those recommending teaching or training experience, had reported similar experience for themselves. One respondent, 1.5 percent, did not have either teaching or training experience.

Of the 102 respondents recommending some college preparation as a qualification, 101 indicated a like experience in their backgrounds. This was the greatest extent of similarity evidenced in this aspect of the data, a representation of 99.0 percent.

In the second open-ended primary question in the research instrument, the respondents were asked to state the explicit criteria used in evaluating their performance as sales trainers. The responses they provided are classified in Table 26 with accompanying relative percentages.

In 75 of the responses, a 21.3 percent representation of all responses, appeared either the assertion or the direct implication that no explicit criteria existed. How the salesmen performed in the field after completing their sales training programs was cited most frequently as the measure by which the sales trainer's work was judged. This criteria occurred 116 times in this portion of the data, calculated at 33.0 percent.

Various forms of feedback were also mentioned as means of appraising the respondents' sales training efforts: oral and written reports from field salesmen

TABLE 26

REPORTED CRITERIA FOR EVALUATING
THE WORK OF THE SALES TRAINER

Criteria Reported	Frequency of Indication	Percentage of Total Indications
Salesmen's Subsequent Productivity	116	33.0
Feedback: Course Evaluations, Formal and Informal	112	31.8
Results of Test and Measurements	12	3.4
No Explicit Criteria	75	21.3
Innovation in Programs	9	2.6
In-Company Progress of Newer Men; Personnel Turnover	28	8.0
TOTALS	352	100.1*

*Difference in hundredths is due to rounding.

and field sales managers; course evaluations by salesmen-trainees; reviews with superiors over monitored training sessions; and the impressions of students, peers, and general management. This evaluative norm appeared 112 times in the data, a representation of 31.8 percent. If this is added to that of salesmen's field performance as a norm, an aggregate of 64.8 percent is obtained.

A review of Table 26 and the above observations should indicate that this data provided far more information with regard to implicit criteria. The difficulty

rested with the researcher's question rather than with the perceptions and interpretations of the respondents.

Aside from the lapse in not stressing the word, "explicit," in the question to the respondents, the nature of the kind of information sought required a different form and phrasing in the question itself. The result obtained, however, is an informative list of implicit criteria and the frequency with which its contents tend to be used.

The Sales Training Program

The job of the sales trainer is materially shaped in terms of the character and form of the sales training program in which he serves. This section of the data is devoted to an explication of those aspects of sales training programs which help determine the context of sales training activity.

The durations of initial sales training phases were reported in a range from weeks to years. The average program length was 7.2 weeks, the median being three weeks. This is to be interpreted that one-half of the respondents claimed their initial training phases lasted no longer than three weeks. The average and the median number of trainees reported in each group or "class" to be trained were almost identical: 12.2 and twelve, respectively.

The extent to which sales trainees receive pre-training familiarization with their future work is exhibited

in Table 27: almost 70 percent of the respondents indicated that such work-familiarization exists. The forms that it takes were divided into field work, product exposure, and programmed learning courses. There was a somewhat even distribution in the responses, for 165 respondents mentioned field work, 176 cited product exposure, and 123 included programmed learning courses. This information is detailed in Table 28.

TABLE 27
REPORTED STATUS OF WORK-FAMILIARIZATION
FOR NEW SALESMEN PRIOR TO THE
TRAINING PROGRAM

Practice	Number Reporting	Percent
Prior Work-Familiarization Exists	203	68.8
No Prior Work-Familiarization Exists	65	22.0
No Response Indicated	27	9.2
TOTAL	295	100.0

TABLE 28

REPORTED TYPES OF WORK-FAMILIARIZATION
FOR NEW SALESMEN PRIOR TO THE
TRAINING PROGRAM

Type of Work-Familiarization	Frequency of Indication	Percentage of Total Indication
Field Work	165	35.6
Product Exposure	176	37.9
Programmed Learning Courses	123	26.5
TOTAL	464	100.0

The respondents reported the frequency with which their sales training classes tended to convene. The results of the information obtained are arranged in Table 29. Over one-third of the respondents indicated that their classes met every day on a full-time basis, whereas fifty-three respondents, the second largest group in this table, claimed their classes convened monthly. The respondents were advised they could indicate more than one category in this portion of the questionnaire; hence, a number of the above-mentioned fifty-three respondents, for example, would have also indicated daily meetings, saying, in effect, that their classes which were convened from month to month met on a daily basis.

TABLE 29

REPORTED FREQUENCY WITH WHICH RESPONDENTS'
SALES TRAINING CLASSES CONVENED

Scheduling Category	Frequency of Indication	Percentage of Total Indication
Daily, Full-Time	105	35.6
Daily, Half-Time	3	1.0
Weekly	14	4.8
Bi-Weekly	8	2.7
Monthly	53	18.0
Bi-Monthly	27	9.2
Semi-Annual	25	8.5
Annual	27	9.2
No Response Indicated	33	11.2
TOTAL	295	100.2

* Difference in hundredths is due to rounding.

A number of sales executives and marketing scholars have felt over recent years that sales training programs have tended to have inordinate stress on product knowledge and to have weaknesses in the areas of selling techniques and the planning and organizing requisite to proficient sales performance. The respondents in the study indicated, with respect to these particular emphases,

the proportions into which their respective sales training programs tended to be divided. Their estimations are recorded in mean and median terms in Table 30: product and company information occupies a mean of 36.9 percent of the content of such programs, with a median of 33 percent; the mean and median reported here for selling

TABLE 30
REPRESENTATIVE PROPORTIONS OF EMPHASIS IN
SALES TRAINING PROGRAMS REPORTED
BY RESPONDENTS

Training Program Emphasis	Mean Percent	Median Percent
Product/Company Information	36.9	33
Selling Techniques, Methods, Tactics	39.3	40
Work-Organization, Planning, Customer- Analysis	21.6	20

techniques are virtually identical: proportions of 39.3 percent and 40 percent, respectively; the planning and organizing of work also shows a close concurrence between its mean of 21.6 percent and its median of 20 percent.

The methods which sales training programs tend to use were listed by the researcher as lecture, case method, role-play, simulation, group coaching, and field

exposure. From among these choices the respondents selected those that pertained to their respective training programs; their indications are reported in Table 31, with classifications made according to those areas of emphasis in the sales training program in which the method reported was used.

The lecture method of instruction for purposes of conveying product knowledge received the greater number of indications, 253, with field exposure having second representation in this area, with 195 indications. With respect to training salesmen in selling techniques, the role-play approach obtained most responses, 253 in number. The lecture method appeared second in total indications, with a representation of 221 in this area. An examination of this table shows that the lecture method is used most frequently to train salesmen in organizing and planning their selling efforts; it is shown at 234 indications, 28.8 percent, with field exposure again represented second with 160 responses, a 19.8 percentage of 813 total indications.

With respect to the use of training aids, the respondents chose from among the following: film slides, movies, video-tape reviews, long-play records, cassette tapes, programmed learning, and text assignments. The respondents also indicated, as with sales training methods, which of the areas of emphases in the sales training

TABLE 31
REPORTED METHODS EMPLOYED IN RESPONDENTS'
SALES TRAINING PROGRAMS

Method	Area of Emphasis					
	Product Knowledge		Selling Techniques		Work Organization	
	Frequency of Indication	% of Total Indication	Frequency of Indication	% of Total Indication	Frequency of Indication	% of Total Indication
Lecture	253	27.5	221	18.7	234	28.8
Case Method	118	12.8	180	15.2	132	16.2
Role-Play	133	14.4	253	21.4	72	8.7
Simulation	92	10.0	170	14.4	106	13.0
Group Coaching	130	14.1	172	14.5	109	13.4
Field Exposure	195	21.2	187	15.8	160	19.7
TOTAL	921	100.0	1183	100.0	813	100.0

program employed the aids indicated. Their responses are arrayed in Table 32.

Film slides and text assignments are used most in support of training salesmen in product knowledge; together they constitute 42.8 percent of the responses made for this area of emphasis. The use of movies also shares notice in this area, being represented in 177 responses of 1042, a percentage of 17.0. The effort to teach selling techniques is reported as aided most frequently by the use of video-tapes, movies, and film slides, recorded at 18.6 percent, 18.4 percent and 15.6 percent, respectively. As with product knowledge, the most frequent indications made with respect to teaching work-organization were film slides and text assignments, which together comprise 42.5 percent of all indications made here.

The decision to include particular methods or aids in a given sales training program can be expected to differ from company to company. The basis for such decisions, however, has been confined to that of each company's situational imperatives, and no consensus has been ventured. The information in Table 33 reflects the sources on which the respondents' companies tended to rely.

Over forty-two percent of the indications made show that it is experience in the field which conditions

TABLE 32

REPORTED TRAINING AIDS EMPLOYED IN RESPONDENTS'
SALES TRAINING PROGRAMS

Training Aid	Area of Emphasis					
	Product Knowledge		Selling Techniques		Work-Organization	
	Frequency of Indication	% of Total Indication	Frequency of Indication	% of Total Indication	Frequency of Indication	% of Total Indication
Film Slides	233	22.4	160	15.6	109	19.9
Movies	177	17.0	189	18.4	89	16.1
Video Tape	132	12.7	191	18.6	64	11.6
Long-Play Records	27	2.6	49	4.8	13	2.3
Cassette Tapes	113	10.8	153	14.9	64	11.6
Programmed Learning	147	14.1	125	12.2	83	15.0
Text Assignments	213	20.4	158	15.4	132	23.8
TOTALS	1042	100.0	1025	99.9*	554	100.1*

* Difference in hundredths is due to rounding.

TABLE 33

REPORTED BASIS FOR EMPLOYING A PARTICULAR METHOD, CONTENT,
TECHNIQUE OR TRAINING AID IN RESPONDENTS'
SALES-TRAINING PROGRAM

Basis	Frequency of Indication	Percent of Indication
Field Experience	199	42.9
Experience of Other Firms	40	8.6
Organizational Conference Deliberations	61	13.1
Recommendations in the Training Literature	38	8.2
Expertise in Judgment of Training Director	126	27.2
TOTALS	464	100.0

a choice of training method or aid. The judgment of the person in charge of training the sales force appears to receive frequent consideration, for his expertise is cited as a basis in 27.2 percent of the indications made. The literature on training received mention least: 8.2 percent of all responses provided in the data.

The respondents in this study reported on whether or not their sales trainees received any follow-up training aside from their later work with sales managers in the field. The results of the responses are presented in Table 34. Affirmative statements with regard to follow-up training were made by 235 respondents, a representation of 79.7 percent of the 295 respondents participating in the study.

The respondents further indicated what forms this follow-up training tended to take; their responses fell generally within categories of six kinds of training which

TABLE 34
REPORTED EXISTENCE OF FOLLOW-UP SALES TRAINING,
EXCLUSIVE OF WORK WITH FIELD
SALES MANAGERS

Practice	Number Reporting	Percent
Follow-Up Training Exists	235	79.7
No Follow-Up Training Exists	38	12.9
No Response Indicated	22	7.5
TOTALS	295	100.1*

*Difference in hundredths is due to rounding.

ensued once the formal sales training program's initial phase was completed: field progress-testing, planned review-seminars at regional or home offices, sales manager supervision, subsequent classroom instruction, mail follow-up, and advanced case-study seminars. An inspection of Table 35 shows the responses fell most frequently in the categories of the planned review-seminars and sales manager supervision, percentages of 36.6 and 39.1, respectively. Their combined representation of all indications made in this portion of the data exceeds 75 percent.

TABLE 35
REPORTED TYPES OF FOLLOW-UP
SALES TRAINING

Type	Frequency of Indication	Percentage of Total Indication
Field Progress-Testing	78	17.9
Planned Review-Seminars at Regional or Home Offices	160	36.6
Sales-Manager Supervision	171	39.1
Follow-up Classroom Instruction	15	3.4
Mail Follow-Up	10	2.3
Advanced Case-Study Seminars	3	0.7
TOTALS	437	100.0

Other Training Information

Separate, formal sales training programs for experienced salesmen were reported to be in force at the companies of 180 respondents, while 94 respondents indicated that no separate program exists. This information is detailed in Table 36.

TABLE 36

REPORTED EXISTENCE OF A SEPARATE FORMAL
SALES-TRAINING PROGRAM FOR
EXPERIENCED SALESMEN

Practice	Number Reporting	Percent
Separate Formal Program Exists	180	61.0
No Separate Formal Program Exists	94	31.9
No Response Indicated	21	7.1
TOTALS	295	100.0

The matter of whether the full sales training responsibility is entirely in the hands of the sales trainer underlies the construction of Table 37. Of the 293 respondents providing information, 224 claimed that their companies do have specific and separate forms of sales training conducted by sales managers, besides those for which the sales trainers are responsible. The proportion represented here is 76.5 percent.

TABLE 37

REPORTED EXISTENCE OF SPECIFIC AND SEPARATE
FORMS OF SALES TRAINING CONDUCTED BY
FIELD SALES MANAGERS ONLY

Practice	Number Reporting	Percent
Specific and Separate Forms Exist	224	76.5
No Specific and Separate Forms Exist	69	23.5
TOTALS	293	100.0

Table 38 presents information with respect to another matter of concern to those interested in the quality of sales management: the formal training program for those designated to be sales managers. Such programs are reported to exist by 63.5 percent of the respondents. It appears, however, that training programs designed to train the sales trainer exist to a somewhat lesser extent: in Table 39, 61.9 percent of the respondents indicated that no formal training program of this kind was being conducted in their respective organizations.

Summary

The purpose of this chapter was to set forth in detail the findings regarding the qualifications of the

TABLE 38

REPORTED EXISTENCE OF FORMAL TRAINING PROGRAMS
FOR SALES-MANAGER DESIGNEES

Practice	Number Reporting	Percent
Formal Training Program Exists	186	63.5
No Formal Training Program Exists	107	36.5
TOTALS	293	100.0

TABLE 39

REPORTED EXISTENCE OF FORMAL TRAINING PROGRAMS
DESIGNED TO TRAIN THE SALES TRAINER

Practice	Number Reporting	Percent
A Formal Training Program Exists	112	38.1
No Formal Training Program Exists	182	61.9
TOTALS	294	100.0

sales trainer and the characteristics of the sales training job.

The qualifications of the sales trainer were described in terms of education and work experience, the latter encompassing backgrounds in field selling, field sales management, training, and academic teaching.

The characteristics of the sales training task were examined in the context of the following:

1. Company Information -- Industry, type, size, and customer classification.
2. Job Information -- Superiors, peers, and subordinates; work-proportions, suggested job-qualifications, and criteria for work evaluation.
3. The Sales Training Program -- Duration, frequency, content, methods, aids, and trainee-administration.
4. Other Training Information -- Programs for sales managers, sales trainers, and experienced salesmen.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter contains a summary of the purposes and procedures of the survey, a presentation of and statements regarding the major findings, conclusions related to the findings, and hypotheses and suggestions pertinent to further research.

Summary

The problem of this study was to discover and to delineate the qualifications of the sales trainer and the characteristics of his work in the training of salesmen. A further intent was to construct certain hypotheses relative to the sales trainer and his work, as an aid -- and a call -- for further research in sales training.

This study consisted of three major phases:

1. An extensive search of the literature concerned with sales training which revealed a considerable body of writings of a normative and prescriptive nature. The research in sales training focused on sales training programs per se; most of this research was to be found

in unpublished dissertations. No studies of the sales trainer appeared in this literature.

2. The accumulation of the data by the use of a four-page, mail questionnaire. The respondents provided information with respect to their companies, their sales training jobs, and their companies' sales training programs, in addition to personal data. Of the 430 addressees, 302 responded to the research effort, a 70.3 representation.
3. The interpretations of the findings in the data, and the formulation of hypotheses with respect to the issue of sales training.

Findings

An analysis of the data collected in the study resulted in the major findings enumerated below:

1. More than 86 percent of the respondents reported they had a college background, and over 32 percent indicated involvement in graduate studies.
2. Management/Business Administration was the most frequently represented undergraduate major field of study: nearly 25 percent. Almost 49 percent of the 295 respondents

majored in one of the undergraduate disciplines in business studies.

3. Of the twenty-eight respondents indicating graduate studies in Education, 27 reported they had had teaching experience in an educational institution.
4. With respect to field sales experience, 44.4 percent of the 295 respondents claimed between two to five years for this category.
5. Of the 118 respondents claiming some sales management experience, over 53 percent had three years or less of this background.
6. Seventy-four respondents reported they had experience in training non-sales personnel; 49.1 percent of these respondents had either one or two years with this kind of experience.
7. Of the 71 respondents stating they had some experience as a teacher at an educational institution, over 57 percent claimed up to three years of this experience.
8. In a cross-matched experience profile of the sales trainer, those most frequently represented in the data were those who had at least both training experience and a college background. Their summed representation

was 203 in number, over 72 percent of the total respondents.

9. Over 61 percent of the respondents came to the sales training function directly from either field selling or field sales management.
10. More than 53 percent of the respondents reported having had formal trainer preparation.
11. Forty-six percent of the respondents indicated that they expected to have served in sales training for their present employers no more than five years, while over 48 percent responded in either indefinite or career terms.
12. A 68 percentage, 203 of 295 respondents, reported that their sales training activities were being conducted for companies in the general manufacturing field.
13. Of the 295 respondents, 68 percent reported field sales experience in the same category of goods or services as that in which they were now conducting sales training.
14. Over 29 percent of the customers of the respondents' companies were classified as being government, industry, or education; 25 percent were identified as retail merchants, over 23 percent as wholesale middlemen, and 22.7 percent as ultimate retail consumers.

15. The superiors of sales trainers were reported to have line sales or marketing titles by 69 percent of the 295 respondents participating in this study.
16. One-half the respondents have at least one trainer peer, and over 47 percent of this study's respondents reported that they have co-trainers conducting non-sales training.
17. The average amount of time spent in face-to-face training with salesmen was specified at 41 percent; the median was 40 percent. The mean proportion reported for sales training support functions was 34 percent, with a median of 30 percent. Administrative tasks showed a 23 percent mean proportion, with a median of twenty percent.
18. The average proportion of sales training done in the field, as reported by the respondents, was 31 percent, while that of sales training conducted at home offices or training centers was over 67 percent.
19. The mean proportion of field sales training conducted with groups of salesmen, as reported by the respondents, was 65 percent, while that of field sales training accomplished with individual salesmen was 26 percent. The

median of the former, however, was 80 percent, while the median of the latter was 10 percent.

20. Over 45 percent of the 295 respondents indicated that their companies made a formal evaluation of the sales trainees' attitudes prior to the inception of training.
21. Of the 295 respondents in this study, 48 percent reported that they receive formal progress-reports on the sales trainees who have completed the initial sales-training phase.
22. Of the 843 separate entries listing recommended minimum qualifications the sales trainer should have, 197, or 23 percent, advised selling experience as a necessary credential for the sales training job. Having some college education was advised 102 times, and being a good communicator was cited 106 times.
23. A match of selected qualifications recommended by the respondents with comparable qualifications possessed by the respondents revealed that 92 percent of those recommending selling experience also had such background. The extent of concurrence was 99 percent for college background, 98 percent for teaching

or training experience, and 68 percent for sales management experience. The latter was recommended 66 times, with 45 of these respondents having had sales management experience themselves.

24. The most frequently reported criteria for evaluating the work of the sales trainer was the subsequent productivity of the salesmen; 33 percent of the 352 entries regarding criteria were of this type. Formal and informal feedback, including course evaluations by sales trainees, was cited by 32 percent of the entries here, and 21 percent of the criteria mentioned claimed no explicit criteria existed in their organizations.
25. The average of the reported duration of sales training programs was seven weeks, with a median of three weeks.
26. The mean of the reported number of sales trainees in the sales training classes was twelve, as was the median.
27. Sixty-nine percent of the respondents reported that new salesmen receive work-familiarization prior to the inception of the sales training program.

28. For those salesmen who do receive pre-training work-familiarization, product exposure was reported most frequently as the form it takes: 38 percent of the 464 indications made by the respondents. Field work was mentioned 165 times, 36 percent of all indications made.
29. Thirty-six percent of the 295 respondents reported that their sales training classes met on a daily basis, and 18 percent stated that their classes convened monthly.
30. With respect to the representative proportions of emphasis in the sales training programs of the respondents, the average reported proportion involved with product or company information was 37 percent, with a median of 33 percent. The average of the reported proportions relative to selling techniques was 39 percent, with a median of 40 percent, and the mean proportion with regard to the relative emphasis placed on teaching the planning and organizing of work was 22 percent, with a median of 20 percent.
31. In reporting the methods employed in the sales training program, 24 percent of the indications made cited lectures for conveying product or company information, while 21 percent indicated

field exposure used for this purpose.

For teaching selling techniques, 21 percent reported the use of role-play and 18 percent indicated the lecture method for this purpose.

In instructing trainees on work-organization, 28 percent of all indications made by the respondents in this section of the data revealed that the lecture method was used for this purpose; 20 percent of the indications identified field work as the method used here.

32. In reporting the training aids supporting the sales training effort, 22 percent of all indications made here by the respondents revealed that film slides were used to teach product knowledge, while 20 percent of the indications pointed to text assignments being used for this purpose.

For instruction in selling techniques, 19 percent of the indications identified video-tape as a training aid for this purpose; 18 percent of the indications cited movies as the aid used here.

For use in teaching the planning and organizing of work, 24 percent of the indications made by respondents selected text

assignments as the aids employed for this purpose.

33. Forty-three percent of the indications made by the respondents cited experience in the field as the basis for employing a particular method or training aid used in their respective sales training programs.
34. Of the 295 respondents involved in the study, 80 percent claimed that follow-up training, exclusive of work with sales managers, is conducted by their companies in behalf of sales trainees.
35. With respect to the types of follow-up training used in behalf of sales trainees, 37 percent of the indications by the respondents revealed that planned review-seminars at regional or home offices were used for this purpose; sales-manager supervision was identified for this purpose in 39 percent of the indications made.
36. Of the 295 respondents involved in the study, 61 percent reported that a separate formal sales-training program was in force for experienced salesmen in their respective companies.

37. Over 76 percent of the respondents participating in the study reported that specific and separate forms of sales training were conducted solely by the field sales managers in their respective companies.
38. Sixty-three percent of the respondents reported that their organizations had formal training programs for those designated to be sales managers.
39. Sixty-two percent of the respondents reported that their organizations did not have formal training programs designed to train their sales trainers.

Conclusions

It may be said that the ideal sales trainer should be one who understands the context of the salesman's work and who has a grasp of teaching techniques and the principles of learning. In reviewing the qualifications of the sales trainers who participated in this study, it appears that, in terms of their educational credentials, they come to their work with a high level of intellectual preparation. There was a substantial number who reported college preparation in fields of study in Business Administration and in Education. From business studies the sales trainer has a foundation for grasping the setting in which

salesmen function, and in studies in education he gains an appreciation and perhaps a mastery of teaching techniques and the principles of learning. The rare trainer represented in this study was he who evidenced both of the foregoing educational backgrounds.

The matter becomes more complex if the ideal trainer is one who has had field selling experience. Many of the respondents, did, indeed, have this as part of their qualifications, but only in conjunction with one of the above educational preparations. It appears that the majority of companies draws on its field sales force to staff its sales training activity. This may be an indisputable aid in providing credibility during the training sessions and for injecting the value of field experience into the sales training effort. But there is no necessary link between successful sales performance and an effective quality of sales training -- no more than there is between outstanding individual sales achievement and proficient sales management. This practice of moving sales personnel into sales training positions is probably related to that former universal condition wherein sales management had the entire sales training responsibility. Today's sales trainer, however, in order to help provide the field organization with superior salesmen for today's sophisticated markets, will require more than some college education and successful selling experience.

Those sales trainers who exhibited some years of teaching experience bring a valuable qualification to their training efforts. As a group, they show much greater evidence of pursuing advanced graduate studies. For these, as might be expected, the difficulty resides in the relatively lesser evidence of field sales experience. It is possible, however, for the dedicated teacher, as the committed sales trainer, to rely on his expertise to compensate for whatever impediment limited sales experience might present.

Almost half the respondents in this study consider sales training as a more or less temporary position. If the duration of the sales training assignment is less than five years, one cannot assume, therefore, that these incumbents perceive it in the same way as they would if it were a career work. And it can be surmised that such a perspective can color the sales trainer's perception of his responsibility in the sales training task. If the trainer of salesmen is not sufficiently rewarded, as Davis and Webster claim,¹ then those who look upon sales training as an interim activity will probably continue to have a considerable representation in the ranks of sales trainers.

¹Kenneth R. Davis and Frederick E. Webster, Jr., *Sales Force Management* (New York: The Ronald Press Company, 1968), p. 59.

In observing that nearly 70 percent of the respondents report to a superior with a sales or marketing title, one is given the impression that this proportion is conducting sales training under a line responsibility. This proxy variable may not be a wholly accurate one, for some of these sales trainers' superiors may have such titles and yet be in turn answerable to a staff executive. But, notwithstanding this reservation, the point needs to be made that it may make a difference if the sales trainer performs in a staff position vis-a-vis a line position. As a staff sales trainer, he is at a remove from the line imperatives of obtaining sales results and the flow of authority which monitors these results. This staff-line distinction too, then, can affect the way in which the sales trainer views his work.

A common complaint voiced by sales executives has been that most salesmen simply do not spend a sufficient amount of their working time in front of customers. Again by way of analogy, one might conject that sales trainers could devote a greater share of their work activities to face-to-face training with salesmen: the respondents in this study appear, on the average, to spend over half their time in activities other than face-to-face training. This needs to be qualified, of course, by the recognition that the sales trainer's work-proportions

must necessarily be formed by the particular dictates of his company's circumstances.

The issue of whether sales training is conducted in the field, or at home, regional or branch offices, is a significant one largely in the sense of recognizing that non-field sales training withdraws the sales trainee from the environment of his work, and that this environmental transfer can contribute to the artificiality which Hise claims sales training programs have.² The benefits which are supposed to accrue to the sales trainee from his sales training program can be seriously diluted once field responsibilities are assumed, for the exigencies of everyday sales work may not reinforce the concepts stressed in training. Indeed, the novitiate salesman may experience circumstances and feelings for which his training has in no way prepared him.

The formal evaluation of sales trainees' attitudes bears on that process which selects candidates for the sales training program, and the sizeable extent to which it was reported in this study that such formal evaluation exists is an encouragement that the importance of this aspect is being recognized. The quality of those to be trained is a pivotal element in the accomplishments expected of the sales training effort.

²Hise, "Conflict in the Salesman's Role," p. 51.

From among the sales trainers in this study, a substantial number of recommendations advised that the sales trainer's qualifications should include selling or sales management experience. This recommendation, in fact, stood out noticeably in the data. The extent of the recommendation, however, should be interpreted to some extent as a reflection of the recommending sales trainers' own credentials, for a sizeable majority of these trainers had a record of field sales experience.

The repeated charge that sales training has tended to over-stress product information and underplay the teaching of selling techniques was not supported in this study as might have been expected. This study's findings indicate that selling techniques obtained a slightly larger share of attention. If anything, it was the instruction in work-organization which obtained a much greater proportion of emphasis than might have been expected.

The traditional methods of the lecture and field-exposure still dominate in teaching product knowledge and work-organization, but role-play assumes a noticeable role, also, in teaching selling techniques. Film slides and text assignments are most often employed as aids for instruction in product knowledge and work-organization, while movies and video-tape are used in teaching selling techniques. It is field experience and expertise in the judgment of the training director which for these respondents

most often determines the use of a given method or aid.

Sixty percent of the firms represented have a separate formal training program for experienced salesmen, while 62 percent reported no formal training for their sales trainers. Sixty-three percent of the firms represented are claimed to have formal training programs for those who are designated to be sales managers.

Hypotheses

The purpose of descriptive, taxonomic research is to provide basic data which detail the elements of a given phenomenon. As such data become sufficiently extensive, comparative research can be initiated, and hypotheses erected and tested. The findings of this study, therefore, may suffice ipso facto as the "conclusions," without reference to the researcher's observations.

Although it is not suggested that this study of the sales trainer has provided data that is universally "extensive," some aspects of his qualifications and his job have been set forth and lend themselves to hypotheses (propositions, postulates) which are intended here to prompt future research with respect to the sales trainer and his work.

Certain recommendations, of course, are implicit in the act of arranging hypotheses and, with respect to the proper bounds of descriptive research, the proposed hypotheses stand as the reference here for implied recommendations. They are stated in the null form so that future research may be designed for testing such hypotheses.

Hypothesis 1. There is no significant difference in sales training programs staffed with sales trainers have Business Administration as a college preparation and those programs with trainers having Education as a college preparation.

Hypothesis 2. There is no significant difference in the training performance of staff sales trainers and line sales trainers.

Hypothesis 3. There are no significant differences in the teaching methods of sales trainers who have field sales experience and those who do not have field sales experience.

Hypothesis 4. There is no significant difference in the sales training methods of sales trainers who have experience in teaching at an educational institution and sales trainers who do not have such teaching experience.

Hypothesis 5. There is no significant difference is the training performance of career sales trainers and non-career sales trainers.

Hypothesis 6. There is no significant difference in the performance of salesmen trained primarily in the field and salesmen trained primarily at home or branch offices or training centers.

Hypothesis 7. There is no significant difference in the sales training performance of sales trainers who have been formally trained and sales trainers who have not been formally trained.

Concluding Remarks

A first step has been taken toward providing an understanding of the full-time trainer of salesmen and the setting in which he works. But it is only a first step. Future studies of the sales trainer, for example, could compare his perceptions with those he is charged with training, just as studies have matched the perceptions of sales managers and their salesmen.

Not too long ago, the only prerequisite to be a sales trainer was field sales experience. Intelligent management perceives this as worthwhile, but insufficient. The questions, then, are: what qualifications should sales trainers have, and, what is the basis for insisting on these qualifications? These same questions can be posed with regard to the person selected to train the sales trainer.

The work of the sales trainer also involves issues that require rigorous examination: the extent to which sales training programs have deliberately incorporated both the implications of small-group social psychology and the existential realities of everyday field sales work; the quality of rigor in planning and executing follow-up training; the comparative thoroughness of training programs for sales managers and sales trainers; and, certainly, the development and testing of explicit criteria for judging the quality of the sales trainer's performance.

It was with a certain empathy for the individual field salesman that this study was undertaken. His work, as that of a change agent transmitting benefits for a return value, instrumentally contributes to the welfare of customers, the life and growth of his company, and the sense of shared achievement for his sales manager and his sales trainer. In that so much hinges on his behavior, the role the sales trainer plays demands an end to trial-and-error selection and functioning, an honest probing beyond what is fashionable on one hand or historically accepted on the other. The quality of the salesman's work is explicable largely in terms of the quality of his training.

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APPENDIX I

EXHIBITS AND COPIES OF
RESEARCH INSTRUMENTS
AND LETTERS

February 17, 1972

Dear M

As a member of the ASTD's Sales Training Division, you are aware that there is a noticeable lack of information about the full-time sales trainer and the actual characteristics of his work.

We are beginning a research project designed to provide this information. It will involve a mail questionnaire, the responses to which will be held in strictest confidence.

Your assistance is essential if we are to reach these full-time sales trainers (those who instruct salesmen regularly). We need the names and addresses of such trainers employed by your firm -- other than yourself.

The enclosed form and envelope are provided for your convenience in assisting this effort.

Our sincere thanks for your cooperation. We greatly appreciate your interest and effort.

Sincerely,

Eugene Robillard

ER:cam

Enclosures



College of
Business Administration
Department of Marketing

SALES TRAINER INFORMATION

Please enter below the names of your organization's sales trainers --- those who perform the tasks of instructing salesmen on a full-time basis. If your own address requires correction, please enter your own name and address.

If there is no policy conflict, the business address is preferred, and it may be that that address is the same for all such trainers in your firm.

Thank you for your cooperation and assistance.

NAME _____

ADDRESS _____

NAME _____

ADDRESS _____

NAME _____

ADDRESS _____

NAME _____

ADDRESS _____

If additional space is needed, please use opposite side of this form.

March 7, 1972

Dear M

As one who performs the task of training salesmen, you are aware that there is a general lack of information about the sales trainer and the actual characteristics of his work.

We have undertaken an international research project designed to provide this information. Our enclosed questionnaire should be completed in less than twenty minutes. Your responses will be used only by the research director and will be held in the strictest confidence. We ask, moreover, that you not discuss your answers with other members of your organization.



College of
Business Administration
Department of Marketing

Your assistance is essential if the sales trainer and his work are to be properly examined and understood. The profile we obtain will depend greatly on what you say about your work. A return envelope is provided for your convenience in assisting this effort.

We plan to provide a report of this study's findings to those who wish it. If you would like to receive that report, please write your name and address at the end of the questionnaire.

Our sincere thanks for your cooperation. We appreciate very much your interest and effort.

Sincerely yours,

Eugene Robillard
Research Director

Dr. Rodney E. Evans
Chairman, Research Committee

Enclosure

139

THE UNIVERSITY OF OKLAHOMA

DEPARTMENT OF MARKETING

STUDY OF THE SALES TRAINER

A. ABOUT YOU

1. What is the title given to your position? _____
- If sales training occupies all or most of your time, please continue.
- If it does not, and your company does not have a formal sales training program, please complete only Sections B and E of this questionnaire.

2. Education

High School: Commercial Course ☐ College Course ☐ General Course ☐ Vocational/Technical Course ☐

College: Major Field _____ Minor Field _____

Graduate Studies: Major Field _____ Minor Field _____

3. Work Experience

In the chart below, please write the amount of experience you have had in the indicated position (Round off fractions to nearest full year):

	Number of Years	
	With this Company	With other Companies
Field Salesman		
Field Sales Manager		
Sales Trainer		
Trainer (Non-Sales)		

4. If you have had field selling experience, please state both what you sold and the related length of experience (the numbered categories below are meant to be mutually exclusive):

General Category	Years of Experience
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____

5. Have you ever held a teaching position on the faculty of an educational institution? ☐ Yes ☐ No
- If "Yes," please indicate the years spent in such a position: _____
6. For how long have you conducted full-time sales training for your present employer? _____
7. What position did you hold immediately preceding this one? _____
8. Have you ever undergone formal "train-the-trainer" preparation? Yes ☐ No ☐
9. How long do you expect to serve in the sales training function for your present employer? _____

B. ABOUT YOUR COMPANY

1. To what industry does your company belong? _____
2. Please classify your company: (more than one may be checked)
- | | | | |
|---------------------------|--------------------------|--------------------------|--------------------------|
| a. Manufacturer/Producer | ☐ | d. Retail Organization | ☐ |
| b. Wholesaler | ☐ | e. Services organization | ☐ |
| c. Industrial distributor | ☐ | f. Other _____ | |
3. How many people does your company employ? _____
4. What was the approximate dollar-volume of your company's sales in 1971? _____
5. What products/services are sold by your company?
- a. _____ d. _____
- b. _____ e. _____
- c. _____
6. Please indicate what category of customer your company primarily seeks to serve:
- | | | | |
|---------------------------|--------------------------|---------------------|--------------------------|
| Industrial | ☐ | Wholesale Middlemen | ☐ |
| Ultimate Retail Consumers | ☐ | Retail Merchants | ☐ |

C. ABOUT YOUR JOB

1. What is your immediate superior's formal title? _____
2. With respect to the sales training function:
- a. How many co-trainers do you have? _____
- b. How many subordinates conducting sales training do you have? _____
- c. Do you have fellow trainers (trainer peers) who do **non-sales** training (production, technical etc.)? Yes ☐ No ☐
3. For the list below, please supply the representative proportions in your work:
- | | |
|--|--------------|
| a. Face-to-face sales training with salesmen | _____ % |
| b. Sales training support-functions: training research, program construction and/or revision, etc. | _____ % |
| c. Administrative tasks: reports, conferences, etc. | _____ % |
| Total: | <u>100 %</u> |
4. Does your work require you to conduct sales training:
- a. Entirely in the field ☐
- b. None in the field ☐
- c. Both; and the proportion is:
- | | |
|-----------------|--------------|
| 1. In the field | _____ % |
| 2. non-field | _____ % |
| Total: | <u>100 %</u> |

5. If you do conduct field sales training, do you work:

- a. Only with groups of salesmen ☐
- b. Only with each salesman individually ☐
- c. Both; and the proportion is: 1. Groups _____%
2. Individuals _____%
- Total: 100 %

6. Are trainees' attitudes **formally** evaluated (tests, measurements, etc.) at the inception of training? Yes ☐ No ☐

7. Do you receive formal reports on the progress of new salesmen once they have completed the sales training phase? Yes ☐ No ☐

8. Please cite the minimum qualifications you feel the sales trainer should have:

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

9. By what explicit criteria is the quality of your work judged? _____

D. ABOUT THE SALES TRAINING PROGRAM

Note: Please consider "formal training program" to mean one that is pre-planned and pre-scheduled.

1. For training new salesmen, what is the **duration** of the "Initial training phase," i.e., before they assume any field responsibilities?

2. Do new salesmen have any work-familiarization prior to the training program itself? Yes ☐ No ☐

a. If "Yes," what form does it take? (please check below)

1. Field work ☐
2. Product exposure ☐
3. Programmed-Learning courses ☐
4. Other (please specify) _____

3. Please list the representative proportions in your training program:

- a. Product/Company Information _____%
- b. Selling techniques, methods, tactics _____%
- c. Work-Organization, planning, customer analysis _____%
- Total: 100 %

4. How many salesmen are there in the average "group" or class? _____

5. How often do the sales training classes meet? (check more than one if applicable)

- a. Daily, full-time ☐ c. Weekly . . . ☐ e. Bi-monthly . . . ☐ g. Semi-Annually ☐
 b. Daily, half-days ☐ d. Bi-weekly . . . ☐ f. Monthly . . . ☐ h. Annually . . . ☐

6. In the charts below, please check the respective items which pertain to your company's sales training program:

a. Methods	Lecture	Case Method	Role Play	Simulation	Group Coaching	Field Exposure
Product Information						
Selling techniques						
Work-Organization						

b. Aids	Film Slides	Movies	Video Tape Review	Long-Play Records	Cassette Tapes	Programmed Learning	Text Assignments
Product Information							
Selling Techniques							
Work-Organization							

7. Aside from the trainees' later work with field sales managers, does any follow-up training exist? Yes ☐ No ☐

a. If "Yes," please indicate the particular form(s) it takes:

1. Field progress-testing ☐

4. Other (please specify) _____

2. Planned review-seminars at regional or home office ☐

3. Sales manager supervision ☐

8. Does your company have a separate, formal training program for experienced salesmen? Yes ☐ No ☐

a. If "No," please state what method, if any, is used to train, or re-train, the company's experienced salesmen:

9. Companies feel they have reasons for using a particular method, content, technique, aid, etc. What is your **most frequent** reason?

a. Field experience ☐

d. Recommendations in the training literature . . . ☐

b. Experience of other firms ☐

e. Expertise in judgment of training director ☐

c. Organizational conference deliberations ☐

f. Other (please specify) _____

E. GENERAL

1. Are there specific, separate, distinct forms of sales training conducted by field sales managers, other than that performed by the sales trainer? Yes ☐ No ☐

2. Does your company have any formal training program for those who are chosen to be sales managers? . . . Yes ☐ No ☐

3. Does your company have a formal "train-the-trainer" program? Yes ☐ No ☐

Number for research control purposes only

Nº 7729

APPENDIX II

TABULAR PRESENTATION OF SELECTED RESPONSES, BY INDUSTRIES

TABLE 1

SIC 2000

MEAN AND MEDIAN NUMBER OF YEARS OF WORK EXPERIENCE
OF ALL RESPONDENTS, IN SELECTED
OCCUPATIONAL POSITIONS

Position Held	Number of Years			
	With Existing Organization		With Former Organization	
	Mean	Median	Mean	Median
Field Salesman	3.9	3	2.7	1
Field Sales Manager	1.9	0	.4	0
Sales Trainer	3.2	3	.5	0
Trainer (Non-Sales)	.5	0	.8	0
Teacher (Educational Institution)			1.0	0

TABLE 2

SALES TRAINER EXPERIENCE-PROFILE

Type of Experience	Frequency of Indication	Per Cent of Total Indications
Field Selling, Training (Non-Sales), Academic Teaching, and College Preparation	5	5.7
Field Selling, Training (Non-Sales, and Academic Teaching	0	0.0
Field Selling, Training (Non-Sales), and College Preparation	33	38.4
Field Selling, Academic Teaching, and College Preparation	1	1.2
Training (Non-Sales), Academic Teaching and College Preparation	18	20.9
Field Selling and Training (Non-Sales) Only	1	1.2
Field Selling and College Preparation Only	0	0.0
Training (Non-Sales) and Academic Teaching Only	1	1.2
Training (Non-Sales) and College Preparation Only	22	25.6
Training (Non-Sales) Only	6	7.0
College Preparation Only	0	0.0
TOTALS	87	99.8

TABLE 3

SIC 2000

NUMBER OF RESPONDENTS REPORTING FIELD SALES
EXPERIENCE IN SAME FIELD AS THAT IN WHICH
THEY NOW CONDUCT SALES TRAINING

Indication of Experience	Number Reporting	Per Cent
Field Sales Experience in Same Field	61	98.4
Field Sales Experience in Other Fields or No Fields	1	1.6
TOTAL	62	100.0

TABLE 4

SIC 2000

CATEGORIES OF CUSTOMERS OF COMPANIES
REPRESENTED BY RESPONDENTS

Category	Frequency of Indication	Percentage of Total Indication
Industry, Government, Education	36	21.7
Ultimate Retail Consumers	40	24.1
Wholesale Middlemen	41	24.7
Retail Merchants	49	29.5
TOTAL	166	100.0

TABLE 5

SIC 2000

NUMBER OF RESPONDENTS REPORTING
POSITION HELD PRIOR TO
PRESENT POSITION

Prior Position Held	Number Reporting	Per Cent
Salesman, Sales Representative, Etc.	25	29.1
Sales Manager, Sales Supervisor, Assistant Sales Manager	31	36.0
Staff Sales Specialist	2	2.3
Manager, Training Center/Training School	6	7.0
Sales Trainer	5	5.8
General Trainer/Personnel	9	10.5
Teacher, High School/College	2	2.3
General Management	0	0.0
Other	0	0.0
No Response Indicated	6	7.0
TOTAL	86	100.0

TABLE 6

SIC 2000

NUMBER OF RESPONDENTS REPORTING HAVING
HAD FORMAL TRAINER PREPARATION

Indication of Preparation	Number Reporting	Per Cent
Have Had Formal Trainer Preparation	54	64.3
Have Not Had Formal Trainer Preparation	30	35.7
No Response Indicated	0	0
TOTAL	84	100.0

TABLE 7

NUMBER OF RESPONDENTS REPORTING ESTIMATES OF TIME
EXPECTED TO HAVE SERVED IN SALES TRAINING
CAPACITY FOR PRESENT EMPLOYER

Estimate Indicated	Number Reporting	Per Cent
Definite, Brief Duration (Five Years or Less)	37	42.5
Indefinite or Career Duration	50	57.5
No Estimate Provided	0	0.0
TOTAL	87	100.0

TABLE 8

SIC 2000

NUMBER OF RESPONDENTS HAVING IMMEDIATE SUPERIORS WITH
SALES/MARKETING OR NON-SALES/NON-MARKETING
FORMAL TITLES

Formal Title of Superior	Number Reporting	Per Cent
Sales/Marketing	58	65.9
Non-Sales/Non-Marketing	30	34.1
No Title Indicated	0	0.0
TOTAL	88	100.0

TABLE 9

SIC 2000

CATEGORIES OF REPORTED TITLES HELD BY
SUPERIORS OF RESPONDENTS

Title Category	Frequency of Indication	Per Cent of Total Indications
Sales Training Manager	32	36.3
General Training Manager	2	2.3
Marketing Director, Manager, Executive	16	18.2
Sales/Branch Manager	26	29.5
General Management (Non-Training/Personnel, Non-Sales/Marketing)	12	13.6
No Response Indicated	0	0.0
TOTAL	88	99.9

TABLE 10

SIC 2000

NUMBER OF RESPONDENTS REPORTING HAVING CO-TRAINERS
WHO CONDUCT NON-SALES TRAINING

Indication of Non-Sales Co-Trainer	Number Reporting	Per Cent
Have Non-Sales Co-Trainer(s)	41	47.7
Have No Non-Sales Co-Trainer(s)	45	52.3
No Response Indicated	0	0.0
TOTAL	86	100.0

TABLE 11

SIC 2000

REPRESENTATIVE PROPORTIONS OF WORK ACTIVITIES
REPORTED BY RESPONDENTS

Work Activities	Mean Per Cent	Median Per Cent
Face-to-Face Training with Salesmen	41.9	40.0
Sales-Training Support-Functions: Training Research, Program Construction and/or Revision, Etc.	33.2	30.0
Administrative Tasks: Reports, Conferences, Etc.	23.6	20.0

TABLE 12

SIC 2000

EXTENT OF SALES TRAINING CONDUCTED IN
THE FIELD BY RESPONDENTS

Location	Mean Per Cent	Median Per Cent
Sales Training Conducted in the Field	34.6	25.0
Sales Training Conducted at Home Office or Training Center	65.3	75.0

TABLE 13

SIC 2000

RELATIVE EXTENT OF GROUP OR INDIVIDUAL SALES TRAINING
PERFORMED BY RESPONDENTS PROVIDING
FIELD TRAINING

Group Activity	Mean Per Cent	Median Per Cent
Work with Groups of Salesmen	60.9	75.0
Work with Salesmen Individually	31.0	20.0

TABLE 14

SIC 2000

MINIMUM QUALIFICATIONS THE SALES TRAINER
SHOULD HAVE, AS RECOMMENDED
BY RESPONDENTS

Qualifications Recommended	Frequency of Indication	Percentage of Total Indications
Selling Experience	61	21.6
Sales Management/Management Experience	26	9.2
Ability to Communicate	34	12.0
Teaching/Training Background	25	8.8
Possess Empathy, Ability to Relate	23	8.1
Have Some College Education	38	13.5
Knowledge of the Sales Job	20	7.1
Knowledge of Psychology, Human Relations	25	8.8
Other	31	10.0
TOTAL	283	99.1

TABLE 15

SIC 2000

COMPARISON OF SELECTED MINIMUM QUALIFICATIONS RECOMMENDED
BY RESPONDENTS WITH SELECTED QUALIFICATIONS
POSSESSED BY RESPONDENTS

Qualification Recommended	Number of Respondents Recommending	Respondents Possessing Qualification Recommended		Respondents Without Qualification Recommended	
		Number Per Cent		Number Per Cent	
Selling Experience	61	57	93.4	4	6.6
Sales Management Experience	26	20	76.9	6	23.1
Teaching/Training Experience	25	23	92.0	2	8.0
College Experience	38	38	100.0	0	0.0

TABLE 16

SIC 2000

REPORTED CRITERIA FOR EVALUATING
THE WORK OF THE SALES TRAINER

Criteria Reported	Frequency of Indication	Percentage of Total Indications
Salesmen's Subsequent Productivity	36	31.3
Feedback: Course Evaluations, Formal and Informal	36	31.3
Results of Test and Measurements	4	3.5
No Explicit Criteria	21	18.3
Innovation in Programs	3	2.6
In-Company Progress of Newer Men; Personnel Turnover	15	13.1
TOTALS	115	100.1

TABLE 17

SIC 2000

REPORTED STATUS OF WORK-FAMILIARIZATION
FOR NEW SALESMEN PRIOR TO THE
TRAINING PROGRAM

Practice	Number Reporting	Per Cent
Prior Work-Familiarization Exists	63	72.4
No Prior Work-Familiarization Exists	24	27.6
No Response Indicated	0	0.0
TOTAL	87	100.0

TABLE 18

SIC 2000

REPRESENTATIVE PROPORTIONS OF EMPHASIS IN
SALES TRAINING PROGRAMS REPORTED
BY RESPONDENTS

Training Program Emphasis	Mean Per Cent	Median Per Cent
Product/Company Information	35.8	33.0
Selling Techniques, Methods, Tactics	40.6	40.0
Work-Organization, Planning, Customer- Analysis	22.3	20.0

TABLE 19

SIC 2000

REPORTED EXISTENCE OF SPECIFIC AND SEPARATE
FORMS OF SALES TRAINING CONDUCTED BY
FIELD SALES MANAGERS ONLY

Practice	Number Reporting	Per Cent
Specific and Separate Forms Exist	64	50.4
No Specific and Separate Forms Exist	63	49.6
TOTALS	127	100.0

TABLE 20

SIC 2000

REPORTED EXISTENCE OF FORMAL TRAINING PROGRAMS
FOR SALES-MANAGER DESIGNEES

Practice	Number Reporting	Per Cent
Formal Training Program Exists	64	72.7
No Formal Training Program Exists	24	27.3
TOTALS	88	100.0

TABLE 1

SIC 3000

MEAN AND MEDIAN NUMBER OF YEARS OF WORK EXPERIENCE
OF ALL RESPONDENTS, IN SELECTED
OCCUPATIONAL POSITIONS

Position Held	Number of Years			
	With Existing Organization		With Former Organization	
	Mean	Median	Mean	Median
Field Salesman	4.1	3	2.1	0
Field Sales Manager	1.3	0	0.4	0
Sales Trainer	3.5	2	0.4	0
Trainer (Non-Sales)	0.8	0	0.8	0
Teacher (Educational Institution)			1.1	0

TABLE 2

SIC 3000

SALES TRAINER EXPERIENCE-PROFILE

Type of Experience	Frequency of Indication	Per Cent of Total Indications
Field Selling, Training (Non-Sales), Academic Teaching, and College Preparation	6	5.2
Field Selling, Training (Non-Sales, and Academic Teaching	2	1.7
Field Selling, Training (Non-Sales), and College Preparation	24	20.9
Field Selling, Academic Teaching, and College Preparation	0	0.0
Training (Non-Sales), Academic Teaching and College Preparation	16	13.9
Field Selling and Training (Non-Sales) Only	8	7.0
Field Selling and College Preparation Only	0	0.0
Training (Non-Sales) and Academic Teaching Only	2	1.7
Training (Non-Sales) and College Preparation Only	49	42.6
Training (Non-Sales) Only	5	4.3
College Preparation Only	3	2.6
TOTALS	115	99.9

TABLE 3

SIC 3000

NUMBER OF RESPONDENTS REPORTING FIELD SALES
EXPERIENCE IN SAME FIELD AS THAT IN WHICH
THEY NOW CONDUCT SALES TRAINING

Indication of Experience	Number Reporting	Per Cent
Field Sales Experience in Same Field	82	71.3
Field Sales Experience in Other Fields or No Fields	33	28.7
TOTAL	115	100.0

TABLE 4

SIC 3000

CATEGORIES OF CUSTOMERS OF COMPANIES
REPRESENTED BY RESPONDENTS

Category	Frequency of Indication	Percentage of Total Indication
Industry, Government, Education	85	34.7
Ultimate Retail Consumers	44	18.0
Wholesale Middlemen	62	25.3
Retail Merchants	54	22.0
TOTAL	245	100.0

TABLE 5

SIC 3000

NUMBER OF RESPONDENTS REPORTING
POSITION HELD PRIOR TO
PRESENT POSITION

Prior Position Held	Number Reporting	Per Cent
Salesman, Sales Representative, Etc.	43	37.4
Sales Manager, Sales Supervisor, Assistant Sales Manager	39	33.9
Staff Sales Specialist	5	4.3
Manager, Training Center/Training School	3	2.6
Sales Trainer	6	5.2
General Trainer/Personnel	2	1.7
Teacher, High School/College	2	1.7
General Management	6	5.2
Other	7	6.1
No Response Indicated	2	1.7
TOTAL	115	99.8

TABLE 6

SIC 3000

NUMBER OF RESPONDENTS REPORTING HAVING
HAD FORMAL TRAINER PREPARATION

Indication of Preparation	Number Reporting	Per Cent
Have Had Formal Trainer Preparation	60	52.1
Have Not Had Formal Trainer Preparation	52	45.2
No Response Indicated	3	2.7
TOTAL	115	100.0

TABLE 7

SIC 3000

NUMBER OF RESPONDENTS REPORTING ESTIMATES OF TIME
EXPECTED TO HAVE SERVED IN SALES TRAINING
CAPACITY FOR PRESENT EMPLOYER

Estimate Indicated	Number Reporting	Per Cent
Definite, Brief Duration (Five Years or Less)	68	59.1
Indefinite or Career Duration	46	40.0
No Estimate Provided	1	0.9
TOTAL	115	100.0

TABLE 8

SIC 3000

NUMBER OF RESPONDENTS HAVING IMMEDIATE SUPERIORS WITH
SALES/MARKETING OR NON-SALES/NON-MARKETING
FORMAL TITLES

Formal Title of Superior	Number Reporting	Per Cent
Sales/Marketing	93	80.9
Non-Sales/Non-Marketing	20	17.4
No Title Indicated	2	1.7
TOTAL	115	100.0

TABLE 9

SIC 3000

CATEGORIES OF REPORTED TITLES HELD BY
SUPERIORS OF RESPONDENTS

Title Category	Frequency of Indication	Per Cent of Total Indications
Sales Training Manager	44	38.3
General Training Manager	10	8.7
Marketing Director, Manager, Executive	24	20.9
Sales/Branch Manager	32	27.8
General Management (Non-Training/ Personnel, Non-Sales/Marketing)	3	2.6
No Response Indicated	2	1.7
TOTAL	115	100.0

TABLE 10

SIC 3000

NUMBER OF RESPONDENTS REPORTING HAVING CO-TRAINERS
WHO CONDUCT NON-SALES TRAINING

Indication of Non-Sales Co-Trainer	Number Reporting	Per Cent
Have Non-Sales Co-Trainer(s)	64	55.7
Have No Non-Sales Co-Trainer(s)	46	40.0
No Response Indicated	5	4.3
TOTAL	115	100.0

TABLE 11

SIC 3000

REPRESENTATIVE PROPORTIONS OF WORK ACTIVITIES
REPORTED BY RESPONDENTS

Work Activities	Mean Per Cent	Median Per Cent
Face-to-Face Training with Salesmen	42.7	40
Sales-Training Support-Functions: Training Research, Program Construction and/or Revision, Etc.	32.4	30
Administrative Tasks: Reports, Conferences, Etc.	22.2	15

TABLE 12

SIC 3000

EXTENT OF SALES TRAINING CONDUCTED IN
THE FIELD BY RESPONDENTS

Location	Mean Per Cent	Median Per Cent
Sales Training Conducted in the Field	26.9	20
Sales Training Conducted at Home Office or Training Center	70.5	80

TABLE 13

SIC 3000

RELATIVE EXTENT OF GROUP OR INDIVIDUAL SALES TRAINING
PERFORMED BY RESPONDENTS PROVIDING
FIELD TRAINING

Group Activity	Mean Per Cent	Median Per Cent
Work with Groups of Salesmen	73.1	90
Work with Salesmen Individually	14.6	0

TABLE 14

SIC 3000

MINIMUM QUALIFICATIONS THE SALES TRAINER
SHOULD HAVE, AS RECOMMENDED
BY RESPONDENTS

Qualifications Recommended	Frequency of Indication	Percentage of Total Indications
Selling Experience	82	25.0
Sales Management/Management Experience	22	6.7
Ability to Communicate	42	12.8
Teaching/Training Background	16	4.9
Possess Empathy, Ability to Relate	38	11.6
Have Some College Education	34	10.4
Knowledge of the Sales Job	33	10.1
Knowledge of Psychology, Human Relations	12	3.7
Other	49	14.8
TOTAL	328	100.0

TABLE 15

SIC 3000

COMPARISON OF SELECTED MINIMUM QUALIFICATIONS RECOMMENDED
BY RESPONDENTS WITH SELECTED QUALIFICATIONS
POSSESSED BY RESPONDENTS

Qualification Recommended	Number of Respondents Recommending	Respondents Possessing Qualification Recommended		Respondents Without Qualification Recommended	
		Number Per Cent		Number Per Cent	
Selling Experience	82	77	93.9	5	6.1
Sales Management Experience	22	10	45.5	12	54.5
Teaching/Training Experience	16	16	100.0	0	0.0
College Experience	34	34	100.0	0	0.0

TABLE 16

SIC 3000

REPORTED CRITERIA FOR EVALUATING
THE WORK OF THE SALES TRAINER

Criteria Reported	Frequency of Indication	Percentage of Total Indications
Salesmen's Subsequent Productivity	38	27.1
Feedback: Course Evaluations, Formal and Informal	50	35.7
Results of Test and Measurements	6	4.3
No Explicit Criteria	35	25.0
Innovation in Programs	6	4.3
In-Company Progress of Newer Men; Personnel Turnover	5	3.6
TOTALS	140	100.0

TABLE 17

SIC 3000

REPORTED STATUS OF WORK-FAMILIARIZATION
FOR NEW SALESMEN PRIOR TO THE
TRAINING PROGRAM

Practice	Number Reporting	Per Cent
Prior Work-Familiarization Exists	87	75.7
No Prior Work-Familiarization Exists	21	18.3
No Response Indicated	7	6.0
TOTAL	115	100.0

TABLE 18

SIC 3000

REPRESENTATIVE PROPORTIONS OF EMPHASIS IN
SALES TRAINING PROGRAMS REPORTED
BY RESPONDENTS

Training Program Emphasis	Mean Per Cent	Median Per Cent
Product/Company Information	38.0	35
Selling Techniques, Methods, Tactics	38.7	35
Work-Organization, Planning, Customer- Analysis	19.7	15

TABLE 19

SIC 3000

REPORTED EXISTENCE OF SPECIFIC AND SEPARATE
FORMS OF SALES TRAINING CONDUCTED BY
FIELD SALES MANAGERS ONLY

Practice	Number Reporting	Per Cent
Specific and Separate Forms Exist	93	80.9
No Specific and Separate Forms Exist	22	19.1
TOTALS	115	100.0

TABLE 20

SIC 3000

REPORTED EXISTENCE OF FORMAL TRAINING PROGRAMS
FOR SALES-MANAGER DESIGNEES

Practice	Number Reporting	Per Cent
Formal Training Program Exists	68	59.1
No Formal Training Program Exists	47	40.9
TOTALS	115	100.0

APPENDIX III

MISCELLANEOUS
STATISTICAL
DATA

MISCELLANEOUS STATISTICAL DATA

	<u>Mean</u>	<u>Median</u>	<u>Standard Deviation</u>
Number of years spent in teaching position at educational insti- tution, as reported by respondents	1.1	0	2.5
Reported number of people employed by respondents' companies	32,879	4,500	72,795
Reported 1971 sales volume of respondents' companies	\$940,771,500	\$2,380,00	\$219,134,000
Reported number of co-trainers as indicated by respondents	5	1	8.37
Reported number of subordinates conducting sales training as reported by respondents	4	0	10.60
Reported number of weeks in initial sales training phase, as reported by respondents	7	4	12.61
Reported number of sales trainees in training class	12	12	10.64