

“Take a Non-Meeting”

According to Phyllis Roteman, president of Sherman Oaks, California-based The Loyalty Group, the meeting as we know it may be as passé as last season’s runway styles.

“Today we can accomplish all the goals of a national sales meeting without holding one,” Roteman says. “New tools let us achieve more lasting change.”

Roteman isn’t in fact advocating that meetings be scratched entirely. What she offers is a toolbox of tactics that are producing tantalizing results. These tools include:

1. *Train a handful of individuals.* Some might be sales trainers, others sales managers, still others might be sales reps. Send them back to their own offices to conduct in-person training of field staff. Multiple benefits include sharp costs in travel costs coupled with a keen ability to bring in locally focused content. Fly in perhaps 20 people to be trained and they in turn can quickly train, say 500. This is knowledge that ripples through organizations.
2. *Use the Internet.* “We see more organizations shifting to a blended approach,” says Roteman, who explain that organizations can combine elements of “train the trainer” programs with Webinars and similar internet-based programs. These programs can reach an employee population at their desks and show bottom-line payoffs.
3. *Speak a common language.* Central to The Loyalty Group’s approach is to meticulously teach sales managers and reps a common thinking process that keeps everybody on the same page when it comes to generating sales plans and funnel reports. When everybody uses the same language, it gets easier to assess progress—and see where improvements are needed.
4. *“thinktwice®.”* A key element in The Loyalty Group’s approach is to make sales training a continuous, ongoing part of every rep’s life. That’s accomplished via the company’s “thinktwice® Sales Cards” that are based on The Loyalty Group’s 31 core concepts that encapsulate what’s needed to succeed in selling today. Each card becomes a kind of mini-training break where the sales rep is reminded of a critical skill. The cards, with such titles as “Find the Pain”, “Talk Less, Listen More,” and “Ask So What,” contain bullet-pointed insights calibrated to refocus a sales rep’s brain on what is truly important. A validation of the cards’ value is that the first order was placed by corporate behemoth Chevron Corp.

“Instead of depending on sales meeting,” says Roteman, “we are finding that we can introduce considerable sales communication in a more organized and more cost-effective fashion using alternative tools. Senior management wants to know: what’s the ROI? What are the results?” According to Roteman, such tools as the thinktwice® cards are providing measurable benefits and, because costs are comparatively low, the ROI is outstanding.

--Robert McGarvey