

Smart Sales Training: The LMS & Salesforce Solution

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Learn how to grow sales training adoption and retention leveraging advanced LMS technology and Salesforce

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Introduction

Sales teams are the lifeblood of your enterprise. Their ability to perform consistently at their peak has a direct impact on your company's bottom line, as well as its long-term success.

But to compete effectively in today's marketplace, these key players must keep up-to-date on your organization and its offerings, while continuously elevating their functional skills and competence.

That's a tall order. It's why sales is arguably the most important group your learning organization serves. And yet salespeople are often your toughest training customers.

So where do you turn for help? This white paper covers insights, tips and resources for leveraging new LMS technology to provide easy and effective solutions.

I. Smart Sales Enablement: How to Leverage LMS Technology

For today's sales professional, new tools and social channels are opening doors to an endless stream of prospects. If not done correctly, this abundant new technology and information can also sink your sales team's productivity by disrupting their workflow and requiring navigation between apps to complete a simple task.

This is especially true for learning. Even in modern enterprise environments, account execs often cannot keep pace with the latest sales updates and product releases. Inevitably, they struggle to pull out the information they need with formal and informal training.

Sales enablement cannot be left to chance. A business' future depends on the ability to develop and sustain an informed, competent and responsive sales team. The best way to do this—share learning and knowledge resources in a more intelligent way with the help of a modern LMS.

Recent research by the Corporate Executive Board (CEB) indicates that 57% of workers expect more “just-in-time” learning. Here are five other smart, technology-driven sales enablement tactics:

1 **Personalize Content with Prescriptive Learning—**

Imagine how much more effective it would be to provide learning content dynamically, based on each salesperson’s unique circumstances and professional attributes. This is prescriptive learning.

> As an example, if someone is responsible for selling product A and B in territory X, a next-gen LMS can prescribe training and knowledge resources related to those products in that location—filtered by an account exec’s specific role and experience level. It’s also possible to deliver content based on learning style and schedule, so the experience is more personally engaging.

2 **Deliver Learning at the Point of Least Resistance—**

Legacy eLearning systems taught us that the more effort it takes to find content, the less likely busy people will use it. But now, cloud computing and LMS innovation make it possible to combine training modules, performance support and knowledge sharing into one easily accessible environment that addresses your team’s learning needs, business behaviors and device preferences. This makes it possible for learning to happen “at the point of least resistance.”

> As another example, many salespeople rely on a cloud-based app like Salesforce as their “universal client,” so they can work productively on a desktop, laptop, tablet or smartphone. An LMS should fit seamlessly into this context, so learning activities become part of daily workflow. The benefit to a standalone LMS, such as ExpertusONE, with a robust Salesforce integration is having a multipurpose system that serves traditional learners, as well as Salesforce users, in context. (See “Fast-Track Your Training Adoption with Deep Salesforce & LMS Integration”.)

With the ExpertusONE for Salesforce app, data from sales automation and other ERP systems is dynamically exchanged with the LMS in the cloud, eliminating three legacy system roadblocks:

- No need to log into a separate LMS
- No more navigating through an unfamiliar “learning” environment
- No data transfer delays between various systems and your LMS

Without these barriers to learning, your salespeople can focus on what matters most—staying equipped to achieve their sales goals.

ExpertusONE for Salesforce

ExpertusONE for Salesforce is the leading modern learning management system for enterprise-class learning within Salesforce. Train multiple audiences with the benefits of advanced gamification, social collaboration, meetings, reporting and commerce.

- Easily access training in Salesforce
- View training activity feed in Chatter
- Auto-enroll Salesforce users into training
- Make decisions with training data in Salesforce Reporting
- Connect multiple Salesforce orgs to ExpertusONE
- Track and manage learning in a powerful LMS

> [Learn More](#)

- 3 Centralize Communication**—Many sales organizations that leverage Salesforce, heavily rely on Chatter as a team communication platform. With many different applications and non-sales activities all competing for a salesperson's and a sales manager's mindshare, centralizing communication is critical.

Notifications and updates from the LMS typically go ignored and are lost in the inbox within a day. By configuring notifications from ExpertusONE to post directly into one's Chatter feed, managers and sales teams have real-time insight into training progress, reminders and updates.

Management can even take advantage of all of Salesforce's Chatter features, even extended visibility into the entire organization through Chatter Free licenses.

- 4 Learn from the Best**—Salespeople prefer to learn by spending time with top performers and listening to their stories and advice. Their valuable insights can help new hires come up-to-speed and perform at a higher level more quickly, while avoiding costly, time-consuming errors.

New LMS technology makes it possible to capture and catalog valuable knowledge from your best people, preserving it for future on-demand access. Video clips, Q&A docs, case briefs, bite-sized “how-to” modules and more can easily be found, shared and discussed using built-in search and social tools. This means field reps have instant access to reliable advice, whenever they need ideas, guidance or validation.

- 5 Drive Training Progress with Dynamic Reporting—**
Today’s sales managers are just as busy as their teams. The faster they can identify weaknesses and assign appropriate learning remedies, the better. Managers also need quick, simple ways to monitor individual and team progress.

A cloud LMS with robust, built-in reporting is an excellent solution:

- Managers can easily configure reports to align with sales methodology, product differentiators, desired capabilities or other factors—and then assign appropriate learning activities
- Automated alerts tell salespeople when learning activities are assigned, and offer immediate access to content
- As soon as salespeople complete learning assignments, managers are notified for further action

Next-gen LMS platforms empower sales teams to be more efficient and effective than ever. The better prepared your sales teams are, the better their performance, and the more revenue they will generate for your company.

II. Four Ways to Drive Revenue from a Next-Gen LMS

Now that you see how sales enablement can bolster your company's bottom line, let's explore other ways to generate revenue from a modern LMS.

While many see training as a cost center, it can, in fact, drive real revenue and even become a profit center. Many successful companies rely on training to generate revenue streams—and a cloud-based LMS makes this goal much easier to achieve.

Here are four examples:

- 1 Sales Team Enablement**—By offering mobile-friendly virtual classrooms and on-demand learning content, you can increase sales readiness while minimizing time away from the field. More knowledgeable salespeople spending more time in the field means more business revenue.
- 2 Just-in-Time Workforce Learning**—Employees in functions such as engineering, marketing and customer service depend on immediate access to relevant, useful information. Especially in fluid and fast-paced technology markets, real-time product training, reference tools and performance support can improve the quality of products and services while accelerating time-to-market.
- 3 Partner Education**—Many organizations sell through resellers and distributors. And successful partner strategies rely heavily on training to develop channel competence and profitable relationships.
- 4 Customer Training**—In the same way that partner education reaches beyond the enterprise, for-fee customer education programs deliver immediate training revenue, encourage product adoption and pave the way for long-term customer loyalty.

How to Earn More from Your Customer Training

If your LMS has robust reporting tools and social capabilities, you can gain invaluable insights to shape your customer learning programs.

> For example, you can track content usage patterns, along with best and worst ratings and recommendations. These metrics can help you calibrate training effectiveness and refine offerings over time.

You can also help your customers gain new insights about their workforce by examining behavior within their learning communities.

> For example, you can profile the most (and least) active, engaged learners. And you can pinpoint topics that are hot, as well as those that are unpopular or quickly abandoned.

When these insights help you inform customers about their workforce learning activity and trends, your LMS becomes part of your customer relationship management process—which ultimately benefits sales growth.

How the LMS Extends Engagement

More than simply driving training revenue, the LMS indirectly impacts the bottom line by engaging your core audiences. Beyond catalog, content and course management, advanced features such as social, mobile, collaboration, conferencing, analytics and commerce improve the effectiveness of training and make learning more accessible to any audience. This leads to greater engagement with learning and improved overall performance.

When used to train customers, the learning data tracked in the LMS can unveil useful insights into customer growth areas and product knowledge. Not only does training improve the customer's experience of the products already purchased, the training analytics also tends to express the areas where customers want to focus and strengthen their knowledge base. This lets account managers identify new opportunities in existing customer accounts based on actions taken by the customer.

FACTS:

Nearly 60% of corporate learning organizations are only “moderately satisfied” with their current LMS.

More than a quarter of these organizations intend to buy a new learning system by 2017.

—2015 Expertus LMS Survey

Following are the three essential factors to consider when choosing an LMS that can help you drive training revenue:

- 1 Simplicity**—Look for systems that work like popular, self-service eCommerce sites (Amazon, Expedia, etc.). The easier you make it for customers and partners to find and buy training from you, the more likely you’ll earn their business.
- 2 Completeness**—Minimize the time and expense of LMS customization and upgrades by choosing a “total package”—which should include the following features:

Must Have Features for a Complete LMS

- A fully integrated global shopping cart
- A catalog that supports all content and delivery types (eLearning, virtual classes, webinars, etc.)
- The ability to accept multiple currencies and payment methods and manage taxes for any location
- The ability to bundle and unbundle content, apply custom pricing and accept multiple discount codes (promotions and licensing)
- A program for securely managing access across business units, divisions, regions, states and countries
- Support for distributed learning on the desktop and on mobile

- 3 Streamlined Workflows**—Aim for connected, streamlined workflows that simplify order management. Look for as much automation as possible (e.g. refund processing) that makes life easier with ongoing growth. And, keep in mind the need for sales recognition and reporting with easy, real-time access to sales data, and the ability to drill-down from group information to individual records.

III. Fast-Track Your Training Adoption with Deep Salesforce & LMS Integration

Now that we've covered some opportunities to drive revenue and sales with your LMS, what are the best ways to quickly get up and running with deep LMS integration in Salesforce?

Since the fastest way to dramatically improve sales training adoption is to make it easy, make it relevant and make it readily accessible, choosing an LMS with deep Salesforce integration makes the most sense. Train sales teams, channel partners or customers with an LMS in Salesforce.

When combining LMS and Salesforce CRM data to deliver training at the point of least resistance, learning becomes a seamless part of the daily workflow.

Salesforce is the ideal environment for embedded sales training, since it is where your salespeople spend most of their time. Your account execs, solutions specialists, help desk staff—everyone who works with prospects and customers—depends on Salesforce as a business tool. So integrating the most useful LMS learner interfaces with the CRM platform makes it easy for your entire organization to stay skilled, informed and on-track.

Three Tips for Finding a Deep LMS App for Salesforce

When companies want a full LMS and Salesforce solution, they look for a deep LMS app in the Salesforce AppExchange to make the most of this approach. Here are three tips to bolster your success:

Tip #1: Sync Data Between Systems

To get actionable intelligence from your analytics, you need the right underlying data. It must be complete, accurate, accessible and up-to-date. It's not enough to simply link Salesforce to your LMS by setting up single sign-on (SSO). You need to go beyond that by setting up a process to sync real-time data between systems.

In particular, your LMS should let you store your organization's training history and activity in your Salesforce system. This helps your leaders and sales team in several ways:

> **When analyzing sales performance, you can overlay training insights**

Let's say you believe your top salespeople are also the most educated, and they use your LMS most actively as a resource. Imagine how useful it would be to see statistics that support those assumptions.

> **When making business decisions, you'll be better informed**

Many companies track customer and partner profiles in Salesforce. But what if, in addition to all the interaction data Salesforce makes available to help maximize relationship revenue and loyalty, you could also know which customers have earned product certification, or which partners have completed their annual training requirements?

Tip #2: Leverage Your System of Record to Extend Training Reach

If your company is like many today, Salesforce is critical to your success. All of your customer, partner and marketing data lives there. It makes perfect sense to be sure all of this business-critical information is also captured in downstream systems—especially in your LMS.

Make sure that you don't settle for an LMS app that only lets you focus on one audience. You shouldn't have to choose between your sales team, your partners or your customers. Instead, look for an LMS that is robust and flexible enough to handle all of your training intelligence from across multiple, diverse groups. This multidimensional capacity helps you make better-informed decisions, and improve learning outcomes across-the-board.

Here are three real-world examples:

- 1 With all of your customer information in your LMS, you can notify the right contacts quickly, easily and reliably about training requirements, new content and events.
- 2 If you gain or lose partners—or if they become certified to offer new products and services—the changes are immediately reflected in your LMS. You can see these updates in related reports, and quickly modify partner training paths.

- 3 Customers and partners often want to start training ASAP. With real-time access to Salesforce data, you can immediately set-up new accounts in your LMS, so people can begin training the moment they're ready.

Organizations that embrace two-way integration between their CRM and their learning hub have better insight into customer behavior, and they operate more efficiently because their sales team, support group and channel partners get the right information at the right time. As a result: sales cycles shrink, help desk ticket turnaround accelerates, customer satisfaction levels rise, churn declines and channel revenues grow.

Tip #3: Make Workflows Work Harder

When you take advantage of the unique architecture of the Salesforce platform, using a deep LMS app for Salesforce, the payoff can be huge.

The genius of Salesforce is that you can easily build software and applications on top of it to satisfy almost any business need. But even Salesforce has its limits—and that's where logic from a well-designed LMS adds tremendous value. (See “Adding LMS Intelligence to Salesforce” callout.)

Adding LMS Intelligence to Salesforce

A modern LMS with a deep Salesforce app, such as ExpertusONE, is not only able to pull data from Salesforce, but also deliver unique learning functionality and records inside the Salesforce CRM.

For example, let's say you want to simplify partner management and entitlements by establishing three distinct relationship levels (Silver, Gold and Platinum). You can use the partner information from Salesforce and the Groups capability from ExpertusONE to automatically tailor, prescribe and guide learning paths for partners in each relationship level. This includes:

- Establishing group-specific training recommendations
- Customizing training alerts and banners
- Distributing relevant email promotions and course and event notices
- Mapping each partner's status and progress on the road to certification
- Enforcing partner level requirements
- Sharing learning activity in Chatter

IV. Sustaining Sales Training: How to Successfully Reinforce Learning

Once your LMS is up and running in Salesforce, you're on your way to success. If you've selected an easy to use and engaging LMS platform that appeals to learners, you're ahead of the game.

FACT: Only 32% of learning professionals say their organizations are “effective” or “very effective” at sustaining sales training. What about the other 68%?

If you want to make your learning last, you need to address two core issues:

- 1 Provide relevant training content and performance support—when and where it brings the greatest value to participants
- 2 Appropriate learning reinforcement to make sure it sticks and extends the useful life of training

In other words, how can you deliver meaningful learning that continuously propels sales success? Fortunately, LMS innovation makes easy solutions attainable.

Capture & Leverage Informal Learning

Only 20% of learning is packaged in formal training courses. That means the lion's share of your team's expertise is gained through informal learning—for example: reading articles, sharing “war” stories with mentors and peers, sharing online videos and audio how-tos, exchanging unstructured email and text messages to seek advice and support or using Google to find market news, competitive information and other intelligence.

It's what your salespeople must constantly do outside of the LMS box to learn what traditional classroom training can't teach them. And now, there's a better way to support both informal and formal learning.

Cloud LMSs provide a more flexible, efficient way to support formal classroom training and eLearning. More importantly, these platforms extend your learning environment to incorporate all of the relevant, valuable informal learning content and channels in one unified, dynamic interface.

Optimize Time-to-Competency for New Hires

With everything your sales team needs to learn available under one LMS “roof,” you can speed onboarding and time-to-proficiency, and reduce the time your salespeople spend in classrooms. Also consider that a portion of most new-hire curricula focuses on topics that are simply unnecessary for sales professionals to absorb immediately (for example, general corporate information and methodologies).

Imagine how much faster new sales employees could be productive if onboarding focused first on necessary sales skills and information—followed in subsequent weeks and months by non-critical training and information. A modern cloud LMS can make it easier to automate custom learning paths for all new sales employees.

Sales Training & Your CRM—A Perfect Match

Meaningful training experiences happen when you bring learning to learners on their terms. The best way to connect with sales professionals is through their Salesforce CRM platform of choice.

Thanks to standards-based REST APIs, it takes only minutes to embed a remarkably robust, real-time learning experience directly into the familiar Salesforce interface. And this results in dynamic, continuous learning that fits seamlessly into daily sales workflows.

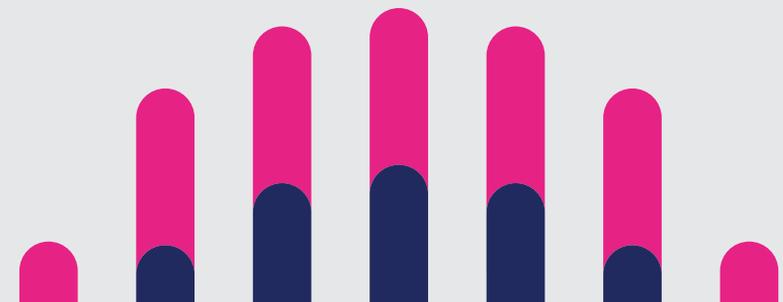
Avoid Duplications: Why Direct Integration Matters

Direct access to LMS data from the CRM is an important distinction to understand.

Many vendors offer LMS/CRM data exchange based on a duplicate copy of the LMS, which opens the door for multiple problems:

- Slow content delivery and system performance
- Data errors and redundancy
- Unnecessarily complex platform management

Direct data sync is the better choice because your salespeople are always one click away from finding and launching the most relevant, up-to-date learning activities—any time, from anywhere, on any device they prefer. No delays. No data distortions. No downtime.



A direct LMS-CRM approach is the easiest way to reinforce sales training. It opens your sales organization to a whole new level of LMS access, convenience and personal control. And this true point-of-work solution means less time away from selling activities, sustained learning engagement and, ultimately, improved sales productivity and performance.

Conclusion

Typically, salespeople can be one of the hardest groups to train. Their time is limited, and their attention is hard to get, let alone keep. That's why it's so important to add new LMS technology to your training arsenal—that embeds learning into the sales workflow. It makes learning available where salespeople work and supports fast, mobile access to perfectly suit their on-the-go work life.



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Caleb is a HCM and Training as a Business industry veteran, helping global organizations implement their successful learning, talent and customer training business models. Caleb has worked with several SaaS products over the years in different capacities ranging from operations, sales and product management.

If you'd like to further discuss how you can better empower your salesforce with modern LMS technology, please contact Caleb directly at calebj@expertus.com or request an ExpertusONE demo at www.expertus.com/demo.

About ExpertusONE

As a trusted learning technology partner, Expertus has built ExpertusONE—the most powerful and intuitive LMS for training any learning audience. The enterprise-class system engages and empowers learners and admins, enhances learning effectiveness and enables distributed learning at scale. ExpertusONE is built on a modern, cloud architecture for continued innovation. Train multiple audiences with the benefits of advanced gamification, mobile, social collaboration and reporting, and extend learning to Salesforce and other systems with the open API library. Learn more at www.expertus.com.