

## **From Assessment to Action: A Case Study on Training Needs and Effective Design**

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### **Introduction**

ABC International was one of the largest players in the beverages market. It started its initial operations in 1886 and it began its operations in 1953 in Pakistan. It offered different varieties of drinks (lesser calorie options, carbonated, juices, mineral water, and energy drinks) in around 200 countries. It had 6 bottling plants and employed around 4500 employees nationwide. The company had regional offices in all provinces of Pakistan and had a strong distribution network that ensured product distribution in rural and urban areas. This case is about the ABC international distribution office located in Johrabad, Pakistan.

### **Background and Problem Identification**

On 20<sup>th</sup> August 2024, Mr. Ali, the sales manager of ABC International Johrabad region was concerned about the inability to meet the sales target for the month. According to the records, they fell short of the sales target in July by 5% and barely met the targets in June. It was found that lead conversions were low in the past three months. The beverage market was highly competitive where traditional drinks and local competitors were present. Although the company had a very good product portfolio with competent leadership, the regional office at Jauhrabad faced certain challenges in attaining its sales targets. The duties of the sales team were regular market visits to the shopping malls and grocery stores that kept the products of

the company. Their role was to tell the shop owners about the product features and ensure its display visibility. Moreover, they were required to do regular follow-ups to ensure that the stock of their products didn't run out.

On next morning, while on his way to his office, Mr. Ali thought that despite the high quality and availability their company offered, why the sales were going down. He reached the office and called a meeting with his team. He inquired about the team members regarding their inability to attain sales targets for the past three months. According to his sales team, most of the members said that it is due to external factors like economic downturn, low purchasing power, shift toward local products and non-carbonated drinks that consequently lead to lower customer demand. He agreed with these issues to a certain extent, but, Mr. Ali was not convinced that this could be the sole reason.

During break time, while sharing a cup of tea with Mr. Ahmad who was the head of the Human Resources department, he showed his concerns regarding the sales target. He said, *"I am really concerned about the sales team's performance, I think we should arrange training for lead conversion as I have found low lead conversion rates that are resulting in lower revenues"*. Mr. Ahmad responded, *"Well there can be some internal issues as well, how about assessing the skills of our own sales team?"*. Mr. Ahmad was of the view that there could be other issues and training should not be done on such a superficial analysis. Mr. Ali was convinced too, and got the idea that the sales team might be deficient in the skills that are needed to survive in today's sales market. Mr. Ahmad responded that training is a time and capital-intensive activity and should not be conducted until the targeted areas of skills gaps are found. Upon further discussing the matter with Mr. Ahmad, they mutually decided to conduct a training needs assessment for their sales team.

## **Needs Analysis**

In order to carry out a training need assessment (TNA), a collaboration of HR and sales departments was done. The decided sources for TNA were the sales team performance reports, customer reviews and peer feedback. However, Mr. Ahmad was of the view that data should be collected from the sales team as well and they should be asked to assess their own training needs. To obtain this data, questionnaires were considered as a suitable source to gather data from the sales team in an economical and timely fashion. To attain these, first of all, the performance appraisal of the sales team was obtained and their customer conversion, sales targets, and feedback were monitored. In addition, an online form was used for the TNA of employees in which their development needs were inquired. They also examined the recurring feedback and complaints they were receiving from the customers. For this, the customer complaint record was checked.

The TNA revealed multiple gaps, first, it was found that as per the KPIs, sales targets were not met and there was an improper follow-up of the leads. The sales team said that they felt less knowledgeable about the product features and persuading tactics to the retailers. The retailers complained that the sales staff do not guide them enough regarding the product and how it should be displayed. Upon further investigating the issue he found out that the product knowledge was not communicated to the customers properly they had less brand awareness. Last, the staff was also observed and it was found that the staff struggled with closing deals with potential leads and retaining the relationship with retailers.

### **The Training Decision**

It took a month for the HR department to complete the TNA, and now Mr. Ahmad the HR manager had all the results. He was now in a position to design a comprehensive training program and for that purpose, he called Mr. Ali and had an initial meeting so that they could narrow down the training areas and decide the training methods. They had multiple options to

train the sales staff in the identified areas i.e., traditional classroom training, using e-learning platforms, or a blended approach. Regarding the training techniques, they discussed the options for a more hands-on technique or using a lecture-based method. Mr. Ahmad said that it would be beneficial that the training technique should be a blend of both so that along with the initial theoretical insights, the sales team can be engaged in case analysis, role-playing, and Mr. Ahmad said that it would be beneficial if they hired a professional trainer from a specialized training agency rather than relying on in-house resources. To him, this would bring a fresh perspective and would result in more diverse learning. Mr. Ali agreed to it, but he was of the view that the training program should be designed by the HR department of ABC International internally. It was of utmost importance that stakeholders should be included in the training design process to make it more tailored to their specific working styles and real needs. Input needed to be sought from the sales team for the preferred training methods. Stakeholder preferences carry significance in the TNA process and commitment is required from all those who are to be trained. After an initial training design, the HR department with the consultation of the Sales head could decide whether they get a professional trainer or multiple trainers in those specific training methodologies.