

2023

## Training Strategies to Improve Salesperson Confidence and Production

William B. Bronson  
*Walden University*

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# Walden University

College of Management and Technology

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William B. Bronson

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Walden University  
2023

Abstract

Training Strategies to Improve Salesperson Confidence and Production

by

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MBA, Eldorado College, 1997

BS, Eldorado College, 1994

Doctoral Study Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Business Administration

Walden University

April 2023

## Abstract

Many sales leaders need strategies to improve the productivity and confidence of their sales personnel. Ineffective sales training programs cost organizations billions of dollars in annual revenue and profits. Grounded in adaptive leadership theory, the purpose of this qualitative mini-ethnographic multiple-case study was to explore successful strategies used by sales leaders that combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. Data were collected by interviewing eight salespeople and two sales managers spanning two Texas insurance companies and reviewing company documents. Data were analyzed using Yin's five-step process and thematic analysis. Three themes emerged: traditional training for learning interpersonal and sales skills, virtual training for learning technical or product information, and hybrid training to maximize the benefits of virtual and traditional training methods. A key recommendation is for sales leaders to choose training methods by the type of information in the course and to allow for flexibility depending on the preferences and needs of the participating salespeople. The implications for positive social change include the potential to enhance employment opportunities in the local communities, which could provide additional financial stability for families and increase tax revenues to support infrastructure improvements and social assistance programs.

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## Dedication

This dedication is to my soulmate and wife for her support and sacrifice during my doctoral journey. I would also like to dedicate this study to my father, who reminded me that I could reach the pinnacle of my career and become a doctor of my profession, even if it wasn't as a physician. Upon his passing, I was determined to pursue and achieve this goal, and his memory has fueled my perseverance and drive along the way.

## Acknowledgments

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## Section 1: Foundation of the Study

### **Background of the Problem**

Sales leaders sometimes need help to reach trainees the way they prefer. Digitally native trainees do not appear to crave virtual learning methods as much as those who experienced the technological innovations of the 1980s–2000s (Bernardes et al., 2019; Boyer et al., 2020). Training personnel in their preferred way increases training transfer to the job and could increase information retention, confidence, and self-efficacy, increasing sales performance and reducing attrition (Rahman et al., 2015).

Training sales personnel is where some companies cut costs and opt for more scalable and affordable virtual learning tools to facilitate their education and orientation programs (Devarakonda, 2019; Nebolsky et al., 2004). The trend has been shifting away from personal mentorship to automated virtual technology, despite evidence that the money saved could be temporary and the long-term effects detrimental to the organization. A company's training program is directly linked to its professional reputation (Holden, 2016).

The most beneficial mix of virtual and traditional face-to-face training methods remains to be discovered and is the basis for this research study. Personal attention from an experienced trainer is more beneficial to digital natives than company managers realize because digital natives have never known life without digital technology (Bernardes et al., 2019). Personal mentorship is effective (Schultz et al., 2021) yet more expensive and not scalable geographically or by trainee demand. Virtual training technology can provide an effective bridge (Devarakonda, 2019; Flink & Cooper-Larsen,

2020; Luo et al., 2021) to add scalability to training programs by demand and accessibility, showing promise as an augmentation instead of a replacement for traditional training methods (J. Chen, 2021; Yu, 2020).

According to Y. Chen and Song (2018), companies spent over \$70 billion training sales personnel, nearly \$1,500 per salesperson, and 20% more than they spent on other roles. On average, the participants in prevalent training programs lose more than 80% of learned knowledge and skills within the first 3 months (Baldwin et al., 2017). The effectiveness of an organization's training program is a significant determining factor in its future success or failure (Leach & Liu, 2003). Training can affect participants' confidence, beliefs, skills, and knowledge transfer to the job. Training can also impact attrition rates, which increases the time, human resources, and money it takes to devise and conduct training.

### **Problem and Purpose**

The specific business problem is that some sales managers lack the strategies to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. Therefore, the purpose of this qualitative mini-ethnographic multiple-case study was to explore strategies used by sales managers that combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. The implications for positive social change include the potential to improve salespeople's confidence and competency, thereby improving consumers'

knowledge and transparency about their buying decisions, providing consumers in local communities with greater value in their purchases.

### **Population and Sampling**

The targeted population comprised sales managers and sales personnel from two U.S. insurance companies located in Texas. The targeted companies had been in business for at least 5 years with an established balanced sales training curriculum and had experienced success in producing productive and confident salespeople. Through nonproportionate stratified random sampling, I selected two sales managers and eight salespeople, enough to reach data saturation.

I began by contacting the insurance organizations known to me to find participants and sought participants through the LinkedIn social network for screening. The screening was necessary to ensure that prospective interviewees had enough knowledge to align with the research objective (Yin, 2018). Participants were informed of their confidentiality, which should have helped them feel more comfortable. Disclosing the confidential nature of interviews can help interviewees feel more open to discussing their experiences (Siedlecki, 2022). The target sampling was randomly selected from respondents; I chose male and female participants equally.

To be eligible, participants needed to be able and willing to communicate with me about their experiences, have had at least 5 years of experience in sales, have had 5 years of experience in their current role at their present employer, and have completed their company's sales training program. The study was accessible to all qualifiers without

regard for gender or disability. The data sources for this study were transcribed interviews and secondary data from business and social networking websites.

### **Nature of the Study**

The three research methods are qualitative, quantitative, and mixed (Strijker et al., 2020). I chose the qualitative methodology for this study to explore the topic in depth. According to Powell (2020), qualitative researchers develop data that explain behavior. In a quantitative study, the researcher can use various methods to obtain answers to closed-ended questions, to test hypotheses about variables' characteristics or relationships. Mixed-method researchers use both qualitative and quantitative methods to analyze complex research questions (Archibald & Onwuegbuzie, 2020). In this study, I investigated the effects sales training has on salespeople's behavior, lives, and families, thus providing the reason for using the qualitative methodology. The study consisted of open-ended questions in semistructured interviews to elicit participant responses, which I analyzed to identify successful strategies organization sales leaders could use to train personnel for maximum performance. Conversely, I did not test hypotheses; therefore, quantitative or mixed-method approaches were not appropriate for my study.

The three qualitative research designs I considered were mini-ethnography, case study, and phenomenological. Harwati (2019) explained that researchers use ethnography to study the relationship between a group of people and an aspect of their lives. According to Pathiranage et al. (2020), a case study is an investigation of one or more individual cases over a period of time. A phenomenological design would cause data analysis to focus on the personal meanings of individual experiences, whereas the



experiences and culture of the sales community may be overlooked. I decided to pursue a mini-ethnography and descriptive multicase study hybrid design because I wanted to explore subjects' lives while discussing how sales training strategies affect sales personnel confidence and performance at work. I chose a multicase study because I wished to identify any common trends across multiple cases instead of a single, isolated case. Manterola and Otzen (2017) wrote that a descriptive case study is used for observing a situation over a period of time and describes the manifestation of a phenomenon in its context. I used a hybrid ethnographic and multiple-case design to explore how sales training methods affect participants' lives and their production, which sales managers use to describe sales results.

### **Research Question**

What strategies do sales managers use to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel?

### **Interview Questions**

#### **For Managers**

1. What sales training strategies do you currently use to train sales personnel?
2. How do you feel about virtual training strategies?
3. What do you think about traditional face-to-face training strategies?
4. What strategies do you use to balance virtual and online training with traditional face-to-face training methods?
5. Which of your training strategies have been most effective?

6. How do you assess the effectiveness of your strategies?
7. How do your salespeople respond to your current training methods?
8. What else would you like to share regarding sales training strategies that I have not asked you about?

### **For Sales Personnel**

1. How have virtual sales training and face-to-face sales training methods affected your productivity?
2. How have virtual sales training and face-to-face sales training methods affected your confidence on the job?
3. Explain how well you learn and retain information from both face-to-face instructor training and virtual online training methods.
4. How has your organization's current sales training program helped or hindered your ability to be productive?
5. What else would you like to share regarding sales training methods that I have not asked you about?

### **Conceptual Framework**

I chose adaptive leadership theory (ALT) as my study's conceptual framework. ALT describes a situation where the leader encourages followers to address problems and changes while completing their work, causing them to adapt. Heifetz and Linsky formed ALT while at Harvard University in 1994 (Heifetz, 1994). Adaptive leadership advances people skills instruction (Kuluski et al., 2020) and fills the gap between the emotional aspects of transformational leadership and the action necessary for positive work

performance under pressure. Managers using adaptive leadership could help followers adapt to changes through perseverance, learning new concepts, and innovation (Heifetz, 1994).

Heifetz and Linsky (2004) identified that the brain's technical problems and the heart's adaptive challenges could benefit from adaptive leadership. The authors were adamant about the necessity of identifying problems first before reacting to situations too quickly. After problem identification, the adaptive leadership method provides a framework that stakeholders can use to help the organization through unexpected challenges. The leader focuses the team on viewing goals objectively from a distance. Before addressing the problem, adaptive leaders must gain approval to proceed and take responsibility for its solution. Goode et al. (2021) remarked that some situations involve high levels of changes and uncertainty, making adaptive leadership a necessity. According to McKechnie et al. (2020), adaptive leadership can benefit interpersonal relationships where confidence in handling challenging and unpredictable situations can mean the difference between composure and chaos. Schulze and Pinkow (2020) defined the theoretical constructs of adaptive leadership, which are leadership capacity, shared responsibility, continuous learning, and independent judgment.

Doyle (2017) described ALT as a lens. I used the adaptive leadership lens because the business problem and subsequent research involved understanding the strategies sales training managers use to prepare personnel to deal with complicated and changing situations. Atefi et al. (2018) revealed that throughout active training, salespeople learn to produce at an increasing rate. Adaptive leadership coping skills can also reduce stress and

burnout (McFarland & Dixon, 2021). Stressors that can affect salespeople include navigating relationships with managers, prospects, and customers. Effective leaders mentor their followers through workplace and industry complexities and help them overcome the obstacles of learning a sales role. ALT accurately fits a trainer's role and how they could formulate strategies to interact with trainees.

### **Operational Definitions**

*Artificial intelligence (AI):* A simulated awareness, by artificial digital characters or objects, of surrounding actions, events, or stimuli that cause an animated reaction emulating a live response (Saleeb, 2021).

*Augmented reality (AR):* Any one of several haptic technologies that use actuators to provide feedback to the human user, facilitating two-way feedback and simulated movement and actions in an artificial digital environment (Saleeb, 2021).

*E-Learning:* Learning or instruction online or through digital simulated means (Alioon & Delialioğlu, 2019).

*Learning transfer (or training transfer):* The practical application of learned information and skills on the job or in live performance (Kodwani & Kodwani, 2021; Massenberg et al., 2017).

*Machine learning:* The concept of programming computers with complex algorithms that emulate learning, continuously adding to its own coding and increasing its database of information (Padmanabhan et al., 2022).

*Predictive analytics*: Involving a complex software algorithm that analyzes a large volume of heterogeneous data to model-predicted results on a variety of queries by the user (Romanov & Filippov, 2021).

*Self-efficacy*: The belief in one's ability to perform an action or reach a goal (Peterson, 2020).

*Virtual gaming technology*: Artificial digital game-based entertainment involving a simulated world or intangible display of game thematics (Rocha et al., 2019).

*Virtual learning environment (VLE)*: An electronic online or simulated environment used for teaching students or trainees from anywhere in the world (Rivas et al., 2021)

*Virtual reality (VR)*: A technology-enhanced experience where individuals interact with an artificial environment for learning or entertainment (Rho et al., 2020).

### **Assumptions, Limitations, and Delimitations**

In this subsection, I explain the assumptions, limitations, and delimitations in the study. The following paragraphs describe some beliefs, possible deficiencies, and boundaries that may affect the study findings. Ensuring validity is of utmost importance because research must first be valid to be taken seriously. The reader must have confidence in the results.

#### **Assumptions**

According to Bloomberg and Volpe (2018), assumptions are the foundational facts in a research study that the researcher accepts to be true and from which they can draw conclusions. Armstrong and Kepler (2018) stated that untested assumptions allow

researchers to draw causal inferences from observed data. Furthermore, determining credible causality in qualitative research relies on untested assumptions. In this study, I assumed that participants told the truth during our interviews. I also believe that interviewing sales managers and sales personnel at more than one company provided a representative view of the insurance industry and the sales profession as a whole. Third, I assumed that sales trainers, mentors, and virtual training provided pertinent and helpful information to trainees.

### **Limitations**

Limitations are the potential weaknesses in the design or methodology of a research study that can influence the interpretation of findings, and that are not within the researcher's control (Theofanidis & Fountouki, 2018). This study had a potential weakness in the number of participants involved in the case study and the limited duration of a mini-ethnographic case study. I limited the number of companies to three and total participants to 20, which was done to prevent spreading the findings too thin and to allow me to provide a rich account of the phenomenon. Some participants may have exhibited varying degrees of truthfulness. As such, a potential limitation in this study was that participants may have tried to use their answers to cast company leaders in an unfavorable light, to gain favor, or to provide false answers for any number of unknown reasons. Another potential limitation in this study was that the decision of what constitutes data saturation was determined by me. Sebele-Mpofu (2020) stated that research saturation is the point where the number of participants is adequate to generate a logical conclusion, provide a consistent view of the phenomenon being studied, and

mitigate subjectivity. The process of reaching data saturation in this study was the concurrent process of sampling and data analysis to the point that I knew when the sample size was adequate.

### **Delimitations**

Theofanidis and Fountouki (2018) defined delimitations as reasons for not taking a specific course of action in the research process. Delimitations are the boundaries researchers deliberately establish to define the scope of their study. I restricted my research to strategies that business managers use so that my research was bound by the phenomenon happening in a specific segment of the sales industry. Another delimitation was the parameters I set on who would be the participants in the study. By designating the insurance industry as the target focus of research and identifying sales managers and sales personnel, I set boundaries to conduct my research. Furthermore, I decided to study medium-sized companies with between 200 and 500 active salespeople in North Texas.

### **Significance of the Study**

#### **Contribution to Business Practice**

By indicating the effects that balanced sales training strategies have on sales personnel's lives and productivity, this study's findings may fill a gap in research regarding the proper mix of traditional face-to-face training and virtual or online training methods. Traditional training methods increase comprehension and confidence because the trainer is there to correct, motivate, and reward students promptly. Schultz et al. (2021) stated that through personal mentorship, closer relationships could positively affect achievement. Virtual training methods expedite the distribution of knowledge and

help ensure that important details are not forgotten. Both training methods have benefits and may prove to be more powerful together than on their own. The proper mix of training methods could benefit sales personnel productivity and the business, creating mutually beneficial outcomes.

### **Implications for Social Change**

The study could have positive implications for social change by identifying training strategies to increase the confidence and competency of people in the sales field, which may benefit the community through better information about consumer choices. The study's findings could influence positive changes that could help improve salespeople's lives, thus affecting their families, and improve consumer knowledge and transparency about buying decisions, providing consumers in local communities with greater value in their purchases.

### **A Review of the Professional and Academic Literature**

The purpose of this research study was to explore strategies used by sales managers that combine virtual and face-to-face training methods when training sales personnel. I performed a comprehensive review of extant literature from peer-reviewed journals and scholarly sources to provide an in-depth review of current knowledge about my chosen phenomenon. During my review, consistencies emerged that suggest positive reasons for using both traditional and virtual sales training methods, and drawbacks to each. In effect, the existing literature presents a powerful case for the use of a blended strategy for training sales personnel.



In this literature review, I present an examination of my chosen ALT. Then, I provide synthesis and analysis of past research to provide a background of sales training methods and their effectiveness. The research presented is organized into four categories: traditional training methods, virtual training methods, hybrid training methods, and personal and organizational factors influencing training.

The literature review contains 108 references from various sources, including the Walden University library, Google Scholar, Google search, and Refseek. The search terms used to find these references were: *adaptive leadership theory, adaptive leadership, sales training, sales training methods, virtual sales training, virtual traditional training, VR training, virtual learning environments, Gen Z training, teaching methods, self-efficacy, motivation training, communication training, sales skills training, hybrid training, blended learning, student training satisfaction, sales training performance, on the job training versus face to face training, sales training mentor, sales training coach, virtual vs traditional training, and augmented reality sales training*. Of the 169 sources in this study, 143 were peer reviewed, accounting for 83.6% of the total references, and 87 were published from 2019 to 2023, representing 50.9% of the total sources.

### **Alternative Leadership Theory**

I used ALT as the conceptual framework (Heifetz, 1994; Heifetz et al., 2009; Heifetz & Laurie, 2001; Heifetz & Linsky, 2004) to present the phenomenon that sales personnel experience in sales training, navigating the changes involved in their lives and careers. The ALT research methodology developed in 1994 by Heifetz and Linsky provides a framework for a hybrid between transformational leadership and path-goal

leadership. Adaptive leadership is part of complexity leadership theory, which involves the strategy and behavior of learning and adapting to complex situations (Uhl-Bien et al., 2007).

Adaptive leaders help their followers accept and adapt to unforeseen challenges while learning to use innovation as a motivational tool (Heifetz, 1994). Northouse (2016) explained that adaptive leaders help their followers learn to adapt personally and at work, in the community, and in society at large. Learning to adapt may contribute to confidence and a resilience that could be advantageous in all areas of life. Adaptive leadership encapsulates the elements making up emotional intelligence, which includes self-awareness, self-management, social awareness, and relationship management. In addition, personal development and long-term learning are centered in the focus of ALT, which helps build confidence. Leaders could use adaptive theory to handle technical problems, which are problems with defined solutions and adaptive challenges. These adaptive challenges are not clearly defined and may require innovation, learning new concepts, and collaborating with others about ways to overcome them.

The adaptive leadership style centers around the actions of the leader concerning the followers' changing work situations and encounters. Use of the adaptive style allows the leader to assume the role of a mentor, helping followers through difficult problems instead of solving problems for followers. As a mentor, an adaptive leader empowers followers and helps them learn ways to deal with changing attitudes, beliefs, and behaviors that they are likely to experience. Using ALT could help sales personnel overcome objections and answer tough questions from potential customers in sales. The

theory indicates how an adaptive leader can prepare followers to adapt to changes in their environment and circumstances to face problems and deal with the challenges of changing situations (Heifetz, 1994; Northouse, 2016). Obolensky (2010) explained that adaptive leadership, while complicated, has a distinct order to it. Adaptive leadership involves polyarchy, a mix of oligarchy and anarchy balancing on a line between traditional leadership and chaos.

Since ALT's formation, many researchers have framed their studies in this action-oriented follower-centric leadership style. Earlier leadership styles such as transformational, transactional, and situational leadership were prepared with a leader-centered philosophy (Arthur-Mensah & Zimmerman, 2017). The adaptive theory is centered in the midst of overcoming challenges and navigating a changing environment. As such, the adaptive approach is an ideal way to view the phenomenon experienced by sales personnel in training.

Hewege and Perera (2013) stated that the adaptive theory lens could resolve the dichotomy of structure and agency perspectives when the phenomenon being studied has a cyclical cause-and-effect nature. Heifetz and Linsky (2004) stated that ALT filled a void between practical task-centered leadership theory and transformational leadership, in which leaders focus on the technical and behavioral needs of followers. Heifetz (1994) said that adaptive theory addresses how leaders focus on helping others do their work while adapting to changes they face. Heifetz also referred to transformational leadership as inspiration, while adaptive leadership is perspiration.

An adaptive leader cares less about inspiring others and more about helping them deal with changes and nurturing them through empowerment and action. Achievement and accomplishment are the catalysts for lasting inspiration. Smothers et al. (2020) stated that positive feedback from leaders helps trainees improve confidence, while teaching sales personnel how to adapt their level of confidence to suit each sales situation can improve successful sales closings (Heiser & McArthur, 2020). Adaptive theory is therefore a viable choice for subjective research ontology and helps frame the dynamic nature of the sales training phenomenon. Layder (1998, Chapter 6) offered some insight into adaptive theory as it mediates grounded theory and more hypothetical testing deductive approaches. Layder also claimed that adaptive theory lends itself more to social analysis.

### **Adaptive Theory: Situations or Problems**

Heifetz (1994) stated that technical problems are in the brain while adaptive challenges are in the heart. Heifetz and Linsky (2004) claimed that there are two kinds of problems:

- Technical problems are reasonable and have clearly defined solutions. Technical problems typically come with solutions defined by the organization, which may be stated in handbooks and guidelines.
- Adaptive challenges are not well-defined, or factual, solutions. Adaptive challenges may require innovation, learning new concepts, and exploring ideas to help solve the problem. Typically, adaptive challenges do not have solutions defined by the organization, are more complex, and are not easy to

solve. Sometimes, adaptive challenges are met with resistance from others and require changes in people's beliefs.

There are some challenges that are both technical and adaptive, which have technical definition but lack the clear solutions defined by the organizational parameters (Northouse, 2016).

### **Six Steps to Problem Resolution with Adaptive Leadership Style**

1. Identify the problem as either technical or adaptive.
2. Help stakeholders focus on the issue.
3. Analyze the issue by viewing the whole situation in context.
4. Verify problem resolution authority and take responsibility for solving the problem.
5. Manage any stakeholder conflict or stress and develop the basic rules of engagement.
6. Create a safe place where open discussion can take place without ridicule or retaliation.

Heifetz (1994) stated that it is crucial to properly identify the type of problem before moving to the next step. The second step is to focus stakeholders on the issue, followed by framing the issue by stepping back to view it objectively. The fourth step is to gain approval to tackle the problem and to take responsibility for its solution. Because solving problems can cause controversy in any organization, the fifth step involves managing stakeholder conflict and developing rules of engagement everyone is expected

to adhere to. The sixth step is paramount because it mandates a safe place where team members can discuss issues without fear of ridicule or retaliation.

### **Adaptive Theory: Perspectives**

ALT has four basic perspectives, according to Heifetz (1994), which are systems, biological, service orientation, and psychotherapy. Combined, these perspectives make up the main ways in which to view adaptive leadership. The four perspectives are as follows:

- Systems involve navigating the business environment. Systemic problems and changes are embedded in complex and interactive systems. Systems evolve, change, and are connected to others in a myriad of relationships.
- Biological perspectives are self-correcting and reflective. People develop and evolve as a result of dealing with changes, adapting to internal cues and external environments.
- Service orientation perspectives deal with empathy. Like a physician, adaptive leaders use their expertise and authority to serve others by diagnosing their problems and helping them find solutions.
- Psychotherapy perspectives involve creating mutually beneficial situations, which is a fundamental part of accomplishing adaptive work. Adaptive leaders understand that people need a supportive environment and adapt more successfully when they face problems head on.

Adaptive leadership concepts fit in many situations in the workplace and other scenarios in life, outside the scope of human resources. Adaptive leadership concepts and

work relate well to family situations, such as navigating through the challenges of a tragedy and change (Bailey et al., 2019). Other aspects of personal and professional life come with their own set of challenges made more difficult by change. Adaptation is not avoidance, but an understanding of the challenges ahead because of unforeseen or presently apparent change phenomena (Bailey et al., 2019). Avoidance comes when stakeholders are afraid or unwilling to do the necessary work it takes to learn and adapt. People often avoid adaptive work because it takes effort, and they are afraid (Heifetz et al., 2009; Thygeson, 2013). Others fear the outcome of the change situation, which keeps them from doing the adaptive work to deal with it (Bailey et al., 2019). People who avoid adaptive work turn to other quicker or more convenient solutions, which can cause confusion and hinder clearly reasoned decision-making abilities (Bailey et al., 2019).

### **Adaptive Theory: In Training Personnel**

In the traditional human resources environment, ALT suggests an ideal dynamic. Even when an organization's workforce spans a wide range of geographic locations, cultures, and customs, the leaders who provide adaptive coaching in the proper doses, including team collaboration, have a significant advantage. Adaptive leaders exhibit the following four key characteristics: trust, confidence, optimism, and resilience (Peesker et al., 2019). In a qualitative research study, Peesker et al. (2019) found that salespeople valued coaching most, followed by bonding, mentorship, and problem-solving activities that built their confidence. One respondent claimed that the most crucial aspect of a leader's role was to help the team solve problems and remove hurdles that hinder production. Effective leaders maneuver depending on the situation (Nelson & Squires,

2017; Northouse, 2016), creating an environment conducive to salespeople doing their jobs and preparing them for unforeseen challenges.

Adaptive leadership in human resource management indicates job proactivity and vitality, which are instrumental in organizations that experience frequent change. Employees want job ownership, to participate in decisions that affect them, and to be involved in social collaboration to have more control over their work environment (Tummers et al., 2015). Under adaptive leadership, employees are more willing to actively participate when they believe the changes are positive and feel safe in participating, which closely aligns with the tasks undertaken by an adaptive leader. The increased connection between leader and subordinate yields positive changes in their lives, education, and careers (Griffin et al., 2012; Nelson & Squires, 2017).

In the mergers and acquisitions industry, many employees experience stressful situations. In highly volatile situations, employees face many stressors and challenges such as job security, deficiency of skills, and cultural misunderstandings. Adaptive leaders can help teams of employees properly align their values with those of the organization and plan for uncertainty (Chung et al., 2014; Nikolaos & Yiannis, 2013). Highly volatile situations call for adaptive skills (Goode et al., 2021), and salespeople learn how to handle relationships and building rapport with confidence, when trained to adapt (McKechnie et al., 2020). ALT provides a framework that helps people deal with, and overcome, their environment's challenges and uncertainties. Proper job placement, reassurance, training, and communication are crucial during organizational change (Nikolaos & Yiannis, 2013).



### **Adaptive Leadership: Criticisms**

Among the many uses and benefits described earlier in this literature review, adaptive leadership has several weaknesses, which could leave it open to criticism. Northouse (2016) explained that there is very little research that tests the claims of the theory, which is built on assumptions and ideas rather than established research. Next, ALT provides many ideas about how leaders can inspire and help followers do adaptive work, but the relationship between the main factors and how they relate to one another is not clearly defined. Leaders with competing objectives (Yukl & Mahsud, 2010) may confuse followers. Some scholars criticize ALT for being too abstract, and many of its tenets are left open to widespread interpretation, which could leave it vulnerable to misuse. Northouse claimed that there is no direct moral dimension explained in the ALT and that the evolution of values results only in a positive outcome. Even though there are hints about the theory leading to equality, justice, and a benefit to the community, the way in which the values evolution leads to these positive outcomes is not explained or defined.

### **Conceptual Framework Literature Summary**

Along with the four theoretical constructs described by Schulze and Pinkow (2020) as capacity, shared responsibility, continuous learning, and independent judgement, there are three phases to using the theory for positive change. Adaptive theory first requires that a determination is made between which elements are crucial and expendable—in other words, determining what parts of the business are good or bad for the organization’s future production and efficiency. The second phase involves

experimenting with the modified or new practices that will usher in future plans. And finally, the last phase of an adaptive shift involves the implementation of the new practices while assisting stakeholders in coping with the stress of changes. Changing companies, changing domicile location, moving away from family, and dealing with illness or bad news all have something in common. Change is ever-present in many aspects of daily life, and adaptive leadership is poised to help people adapt and navigate changes (Northouse, 2016).

### **The Effectiveness of Training Methods**

For decades, companies have sought to effectively and efficiently train employees and sales staff while minimizing costs. The trend has continued to move away from personal face-to-face training and more toward virtual training and e-learning. However, research has shown that personal attention from an experienced trainer still holds the top spot for the most effective training method and that virtual training may be best as an augmentation (J. Chen, 2021; Donohoe et al., 2006; Yu, 2020) of traditional methods instead of a replacement. Researchers have explored the need for training and the effectiveness of virtual training (Devarakonda, 2019; Flink & Cooper-Larsen, 2020; Luo et al., 2021; Upadhyay & Khandelwal, 2018). However, too little attention has been given to the training method, budget, organizational climate, the preferences of the trainees, and capabilities of the trainers (Erffmeyer et al., 1992). Many training managers do not consider the concept of virtual training augmentation of traditional methods as a catalyst for increased productivity and training satisfaction, particularly from salespeople.

Training effectiveness is one of the most critical predictors of organizational success. If devised and delivered effectively, training can increase sales personnel knowledge, confidence, and reduce attrition (Rahman et al., 2015). The effect training has on a salesperson's beliefs, knowledge, and skills have far-reaching implications for organizations. A positive effect leads to better knowledge acquisition and retention, beneficial behavioral changes, and ultimately organizational outcomes (Leach & Liu, 2003). If training is not done thoughtfully, it can have negative effects. Salespeople were found to be less effective when sales manager intervention was too frequent (Dubinsky, 1996). A quality training program can help salespeople hone their skills and become a trusted advisor to clients, solidifying their importance to clients, and raising the professional perception of their organizations (Holden, (2016).

### **Traditional Training Methods**

Trainees have attitudes towards the training methods offered by organizations, and these attitudes influence how well they learn, perform, and view the company after the training program. Bernardes et al. (2019) stated that millennials prefer on-the-job training, despite their affinity for technology and comfort level using it. Boyer et al. (2020) confirmed that Generation Z feels much the same way. While not reacting well to constructive criticism, Gen Z trainees enjoy having a mentor to emulate; someone with experience they can model their behavior after to achieve a successful outcome on the job. One of the most significant precursors to salesperson success, according to Bradford et al. (2017), is their ability to apply learned skills to their day-to-day job duties. The

Bradford study showed that in-person coaching and mentoring during live sales appointments increased trainee knowledge transfer and self-efficacy.

Experience-based training is a viable method of providing students with practical experience in their field of study (Chapman & Avila, 1991). Chapman and Avila (1991) wrote that experience-based training provided students with real-world experience in the full scope of activities necessary to succeed in a sales job. Self-efficacy is one's belief in their own abilities to successfully attain an expected performance standard. As a construct, self-efficacy has been widely investigated and determined to be subjective to personality traits, past experiences, and other ancillary variables (Peterson, 2020). Real-time on-the-job experience has a far more significant impact on self-efficacy than the role-playing or the simulated instruction that pervades the content in many training programs (Knight et al., 2022). Trainees realize the need for role-playing but prefer the excitement of live training on real sales appointments, which can help solidify their training concepts and reinforce good habits (Nielson & Border, 2016). The role of an experienced sales coach cannot be overstated.

The hallmark of traditional face-to-face training is the personal interaction with a qualified instructor or mentor. Traditional training methods date back to the dawn of human history and changed very little until technological advancements provided an ever-increasing selection of options. Traditional training methods readily involve collaboration and engagement, which Alioon and Delialioğlu (2019) found to increase student self-efficacy and reduce anxiety. Self-efficacy ranks higher than

conscientiousness, extraversion, agreeableness, openness to new experiences, and emotional stability in predicting sales performance (Gupta et al., 2013).

Collaboration helps students learn better and connect learned concepts to everyday life. Evidence shows an increase in production when on-the-job experience and face-to-face intervention are used during training (Burhanuddin et al., 2022). Sometimes called action-learning, Arciniega et al. (2021) also found a link between self-efficacy and increased performance when introducing on-the-job intervention training. Arndt et al. (2018) found that sales training students showed greater success, confidence, motivation, and longevity when the training program included actual sales calls with potential customers. The coaching and modeling of training topics by an experienced mentor proved to be a valuable demonstration for students to witness.

Researchers have shown that students were more attentive when giving and receiving peer assessments of their work. Attentiveness, cognition, and affection affect peer assessment success (J. Chen, 2021). Students show higher concept retention when providing feedback to their peers, participating in the teaching process, and increasing their overall engagement in their active learning role. Interpersonal skills are essential for success in cognitive occupations (Deming, 2017).

Conde et al. (2020) emphasized spending the necessary time to effectively devise and implement an adequate training program. Salespeople who do not get the training needed from work will seek outside help from peer groups, which could be beneficial and dangerous to the organization. Salespeople learn best while interacting with others but could learn bad habits, cut corners, and do things the wrong way. They could also be at

risk of recruitment from other organizations or peer pressure to seek alternative employment.

Attia et al. (2014) showed that advanced sales training programs include needs-based, solutions-based, and customer-centric selling strategies. Two studies showed the effectiveness of training in general, with the need for enhancements to improve information retention. Bernardes et al. (2019) discovered that managers, trained predominantly in a classroom setting and non-management personnel, primarily trained on the job, noticed a common occurrence of low information retention. When training participants received additional enhanced training intervention, they retained significantly more information. Jan et al. (2013) noticed a similar occurrence with information retention and transfer to the job that negatively affected performance. Student behavior after training indicated the need for program enhancements, such as on-the-job mentorship, post-training evaluations, or other means of bolstering the training program curriculum. Virtual instruction, enhancement, and follow-up e-learning methods could augment traditional training to provide a meaningful improvement.

### **Virtual Training Methods**

Critics of traditional training methods claim that they are fixed and inflexible due to an outdated institutional mindset. Baldwin et al. (2017) uncovered that nearly 75% of managers were not satisfied with their company's training outcomes because retention and learning transfer was low and felt that technology could help. Learning transfer is the rate at which training concepts and information learned during the training program are

carried forward into the day-to-day work activities to benefit personnel, consumers, and organizations.

Use of virtual learning environments (VLEs) makes it possible to teach students simultaneously around the world. A VLE is also a useful tool for instructors to use when providing learning materials to trainees, tracking progress, logging grades, and tracking feedback (Rivas et al., 2021). Using VLEs allows the ability for rich content, video instruction, collaboration tools, and social media integration that gives students a way to openly communicate what they've learned with their peers (Sbeit & Wang, 2017).

Virtual, or technology-based, training methods are becoming more accessible for smaller companies to offer. Attia et al. (2014) stated that larger multinational companies have more advanced training programs because they need to solve more complex training problems and have greater financial capabilities. Smaller, less-funded organizations were shown to have less robust training programs, preventing them from enjoying the efficiencies, scalability, and growth opportunities to compete effectively in a progressive marketplace. As awareness and accessibility improves, virtual training technology becomes more feasible for large and small businesses alike (Nebolsky et al., 2004).

Augmented reality and virtual reality (AR/VR) technologies typically require a specialized programmer to create the pieces that make up a training class. The introduction of new tools, such as SchoolAR, provides instructors with the ability to develop their content without programming skills (Puggioni et al., 2021). Modern didactic tools can help instructors produce timely and updated material, which can aid in increasing successful student outcomes.

Proponents of virtual training methods claim that they are less expensive and more scalable than traditional training methods, allowing for global training faster than traditional methods would allow (Devarakonda, 2019). With advanced technology such as artificial intelligence (AI), virtual training is also becoming more personalized. AI in training systems is not simply used in video and simple automated instruction, but in an immersive virtual environment where sensory manipulation can add to the experienced realism (Upadhyay & Khandelwal, 2018). Flink and Cooper-Larsen (2020) found that AI helped sales trainees learn how to interact with consumer prospects, deliver presentations, and close sales. AI is an enhanced teaching method for online classes typically restricted to in-person attendance. Flink and Cooper-Larsen showed that AI technology positively affected student sales delivery, including the nuances in sales-related interpersonal communication.

The use of AI has helped students learn how their pauses, inflection, cadence, and speech rhythm affected their practice prospects (Flink & Cooper-Larsen, 2020). AI also can provide the fundamental immediate feedback typical in live interactions. Luo et al. (2021) showed that the people skills of negotiation and sales presentation can be taught virtually through AI if the AI responses are sensitive to the trainee's ego. Such abilities exist in AI with live analysis of the trainee's speech patterns, inflection, defense mechanisms, and timing. The powerful analysis capabilities of AI coaches could provide a valuable tool in training programs. The proper uses and amounts of AI involvement vary based on salesperson aptitude and talent. Those with more to learn seemed to be overwhelmed by the amount of feedback from the AI coaches. These researchers



provided promising data for the use of AI when live instruction is not available or when management decisions preclude it.

Highly evolved virtual learning environments can include both 2D and 3D interfaces with the advanced tools and capabilities to handle practical-based subjects like engineering, science, architecture, and the arts (Saleeb, 2021). When VLEs can provide adequate tools and methods, student engagement, collaboration, and retention increase. Positive results decrease if virtual training lacks realism (Shorey et al., 2020) and is technologically inadequate. Virtual pedagogical agents are beginning to augment or replace human instructors, which presents issues in providing students with the social components of personalized language, politeness, personality, gestures, and emotional support typically available with live teachers (Sinatra et al., 2021).

Efficiency is another reason many organizations turn to technology for their training needs. As technology becomes more advanced, the role of virtual training could be effective when face-to-face training is unavailable. Gourlay (2021) discovered that digitally mediated learning helped teachers when COVID-19 forced the learning process to shift from traditional to virtual. Gourlay challenged the notion that digital learning is a non-physical act, hindering the benefits of tactile learning, by explaining that digital mediums and devices comprise physical attributes. For example, live video conferencing helps bring real people closer together through digital means. Many students, particularly Generation Z, are adept at collecting information from a variety of sources at the same time (Thacker, 2016), but need to feel connected with their educators. Gourlay stressed that educators need a greater focus on learning details about each student. Educators

could use detailed information about their students to help them connect to students digitally, mitigating the tendency of digital educators to neglect qualitative and ethnographic training approaches.

Virtual training can be a valuable tool when training sales personnel. There is a growing acceptance among stakeholders (Bauman, 2017), when the courses are appropriately produced and with the proper mix of virtual interaction and live video instruction. Learning platforms that include an interface for interaction and collaboration significantly increase student satisfaction with virtual training (Pandey & Solanki, 2021). Dickinson et al. (2022) showed that video proved to be the most effective medium for teaching people skills when the method consisted of instruction, implementation, and follow-up support. Particularly in virtual reality learning environments, validation-based feedback can help provide reassurance to students and increase their confidence, retention, and engagement (Rho et al., 2020). Furthermore, trainees showed greater information retention and a higher training success rate when they had hard copy learning materials before virtual training, and the program included post-training support.

Han and Resta (2020) stressed that the participants' perceived value of virtual instruction corresponded to the level of engagement and collaboration involved in the training program. Once the novelty of the virtual technology subsided, students settled into learning the virtual classroom tools and features. Once the virtual classroom became more familiar to participants, collaboration with classmates boosted their enjoyment of the platform. Han and Resta presented a compelling argument in support of exclusively

digital instruction when the program gives enough attention to the psychological needs of the students. Many students have expressed concerns that they feel isolated and insecure when training programs exclusively use a self-regulated virtual learning platform (Sorong & Sutradhar, 2021).

The notion of collaborative learning is backed by many researchers. Herrera-Pavo (2021) found that collaboration was critical to participant success. Herrera-Pavo related collaborative learning with a constructivist perspective because the collaborative approach lends itself to creating knowledge through group interaction. The author claimed three important factors make collaboration work in a digital environment. A virtual learning environment that supports collaboration, characteristics of group interaction, and the learning situation were all crucial to collaborative digital learning. Virtual collaboration is possible if the technology supports it. Teaching collaborative problem solving, which consists of collaboration, critical thinking, problem-solving, and decision-making skills is crucial for a virtual training program (Care et al., 2016). A final aspect of virtual collaborative learning was found to be necessary. Along with personalized feedback, Herrera-Pavo stressed that accountability and a mechanism for student reflection were equally important in the technology features list.

Researchers have claimed that partitioning information helped students remember the material better when using virtual instruction methods. Logie and Donaldson (2021) wrote that life is full of a barrage of experiences that complicate information retention and recall. The difficulty comes from the lack of pauses to allow learned information to be correctly packed and stored in our brains. Event segmentation theory states that

memory can be optimized by placing clear boundaries between blocks of experiences (Radvansky, 2017). Segmenting data provided an overwhelming advantage to students' memory over no segmentation. In addition, students indicated that they remembered data in clusters based on where they learned it. The students associated the data grouped within locations, possibly helping recall.

Critics of virtual training methods claim that they reveal significant inconsistencies, weaknesses, and limitations in certain situations. Seibert (2021) claimed that problem-based learning helps students learn critical thinking and problem-solving skills and attempting to teach these virtually is futile. Lacka et al. (2021) demonstrated that students in higher education provided evidence that they were better off not using virtual learning methods, including social media, in their classes. The evidence showed that students seemed to prefer traditional teaching methods to virtual or social media-driven tools when more complex concepts are involved. Younger learners crave physical interaction with the world around them when essential for learning (Thacker, 2016). Students might find it easier to learn complex topics when training programs involve real-time interaction with an experienced instructor.

Invariably the future of training involves virtual technologies, including video, artificial intelligence, machine learning, predictive analytics, and more. Virtual training mediates some pitfalls of traditional instruction involving time, expense, and employee turnover. While technology relieves much of the financial burden typically present using traditional training methods, there are limitations. Specifically, Generation Z psychological characteristics indicate that, while they seem to enjoy operating

independently at their own pace, they require feedback and encouragement to quell their anxiety (DiMattio & Hudacek, 2020). Nebolsky et al. (2004) saw a Utopian-like future where virtual replaces real and machines replace teachers. It may be difficult to replace live teachers and their ability to provide the personalized feedback and empathy to nurture future trainees. Machines are valuable tools, and learning technology is an incredible way to gain valuable insight. Beuk (2016) acknowledged the value of technology and games but reaffirmed the need for a human master to wield them.

### **Hybrid Training Methods**

Bell et al. (2017) conducted an exhaustive review of training and development over 100 years beginning in 1917 that showed a shift from focusing on efficiency to concentrating on the student. Over time, company leaders began to focus more on developing the trainee as an evolving and intelligent human resource. Recent developments in training strategy prompted a shift from passive learning to a more active learning environment, where participants engage in the process. Technology reliance continues to increase, giving participants incredible control over their learning process. Despite the prevalence of technology-centered instruction, students substantially benefit from leader briefings and breakout sessions. Teamwork brings trainees together in a collaborative environment, where they can share what they have learned virtually and provide feedback to each other (J. Chen, 2021). Collaboration has surpassed persistence and urgency as the most significant predictor of training program success (Öncü & Bichelmeyer, 2021).

Research has shown increasing benefits from hybrid training, virtual and technology-based training injected into traditional face-to-face training methods. Students prefer the hybrid training model to exclusively virtual or traditional models (Yu, 2020). Organizations could integrate e-learning into their sales training without disrupting traditional instructor-led training. E-learning, or virtual learning, could augment traditional face-to-face programs to enhance program adoption, effectiveness, and strategy usage in real sales situations (Donohoe et al., 2006). There is a strategic advantage of using blended training programs that incorporate virtual and face-to-face methods. Some benefits include the increased geographic replication of training (Rocha et al., 2019) while reducing the training time necessary for preparing new personnel.

Virtual training augmentation could help capture the attention of younger professionals. Games have come a long way in enticing more digitally native trainees. Beuk (2016) evaluated the perceptions of virtual sales simulation games, case discussions, and traditional training from salespeople and instructors' viewpoints. Games have long been considered instrumental in teaching, just as rap music helped students remember facts in the mid-1980s. However, some instructors were reluctant to adopt game simulation into their traditional instruction until more recently. Students in the Beuk study liked simulation games and typically found technology more fun and interesting, though less effective, than traditional lectures or face-to-face conversations. Trainees felt that in-person training was more beneficial because it helped them learn the deeper meanings behind the lessons. Still, trainees feel that virtual game-based training was an exciting enhancement.

Using technology helps deliver analytic data to training managers for participant monitoring. Virtual gaming technology helps increase training retention, trainee engagement, advanced product knowledge, confidence, readiness, and overall training program satisfaction (Rocha et al., 2019). The adoption of game training varies, and educators feel it does not harm the training process but only enhances it. Instructors warned that game training could harm the teaching process if used too much and relied on too heavily. Instructors indicated their reasons for not adopting virtual methods: limited time, resources, and innovation were not their top priority. It appears these instructors did not understand that virtual training methods could help them free up time to devote to more critical parts of their instruction.

As technology natives, Generation Z has both an affinity for virtual training mediums and an aversion to using virtual technology for training purposes. However, Cilliers and Cilliers (2021) showed that Gen Z trainees prefer imitation learning, which can be face-to-face or virtual using social media platforms and electronic social environments. Gen Z workers tend to be entrepreneurial, and they need adequate feedback and encouragement (DiMattio & Hudacek, 2020). Emulating an experienced trainer proves the efficacy of training concepts. Emulation reinforces that the trainee is capable of performing the expected task. Cilliers and Cilliers concluded that while Gen Z participants prefer technology, they crave a balance between virtual and face-to-face instruction.

Virtual training could serve a purpose in significantly enhancing sales personnel's technical information retention. Eleven years after the Donohoe et al. (2006) study, Popp

et al. (2017) supported the need for experienced mentorship and face-to-face training as a primary training method. Despite data showing that sales training helps boost sales performance, some organizations have a shocking lack of training available. There seems to be a correlation between the high supply of sales job applicants and the lack of attention spent on training. The increased workload on management personnel caused by high turnover uncovers the need for more efficient and duplicatable training programs to retain sales staff and reduce attrition. Prior research on the topic of training effectiveness revealed that practical sales training had four parts: how participants reacted to the training; their overall skills, knowledge, and attitude; behavioral modification; and adequate post-training evaluations (Honeycutt et al., 2015).

A participant's belief that training benefited them seemed to be a crucial component of general training effectiveness. Popp et al. (2017) found that informal coaching and mentoring were among the highest perceived benefits, followed by management reviews, face-to-face observation, role play, and peer review. Those surveyed felt that in-person mentorship with an experienced salesperson was the most beneficial overall. The lowest benefit showed in virtual methodologies like video tutorials and computer training.

Despite organizations' increasing thirst for the adoption of virtual and e-learning methods, existing research consistently shows a great need for traditional face-to-face training components. According to Mosca et al. (2019), Generation Z trainees have trouble using their native technology strategically because it takes away from critical thinking skills. The students prefer using technology while reinforcing knowledge with



hands-on exercises that they can emulate and repeat. Mixing tablets, smartphones, videos, and technology with real face-to-face interaction creates a sensory-rich learning experience. Mobile devices can support communication efficiency outside the training classroom to aid in sales training and support collaboration (Torres et al., 2020).

Virtual training participants consistently report a concern with the lack of realism in virtual reality training methods and whether it would equate to adequate instruction for real-life situations requiring interpersonal skills. Shorey et al. (2020) emphasized the need for face-to-face training, particularly for training in real situations dealing with human interaction. Typical participant conclusions are that virtual lessons help boost confidence in technical and professional knowledge while they lack the effectiveness in teaching rapport building and conversation skills. Interpersonal skills, like empathy, improve the ability to build relationships and are instrumental in the sales process (Frino et al., 2016).

Soft skills such as presentation skills, questioning ability, adaptability, self-control, involvement, relatability, and interpersonal skills affect sales outcomes. Mardatillah et al. (2018) claimed that soft skills training affected sales performance. Market saturation can cause prospective buyers to feel overwhelmed with sales pitches. In these situations, more than in others, interpersonal skills and adaptability are essential to sales success. Mastering social skills is essential to success in many high-paying jobs (Deming, 2017). Presentation skills, communication, adaptability, technical knowledge, self-control, and the sales environment contribute to sales success. Training that involves

teaching students how to communicate better with other people improves overall sales performance.

Future technological advances could bridge the gap by providing a better realistic encounter for students. However, there seems to be a consistent realization that virtual training cannot in some ways replace real face-to-face experiences and that a portion of all training should include live instruction by an experienced trainer or mentor. Blended learning shows an increase in student engagement and interest (de Brito Lima et al., 2021). Blended learning can also help participants improve their moral values because students interact socially in respectful discourse (Sitorus et al., 2021).

Y. Chen and Song (2018) found an 80% information retention loss after 90 days from the conclusion of training. To increase retention, the authors recommended tailoring training to fit trainee attributes, leveraging technology to help solidify training concepts, and following up with regular reinforcement on the job. Digital storytelling has shown to be successful at aiding instructors in teaching important job skills such as problem-solving, making strategic decisions, cooperation, and forming compelling arguments (Niemi & Multisilta, 2016). This is a prime example where traditional training and technology can work in tandem to maximize training effectiveness.

There is a consensus that personal instruction is the most widely successful means of training people (Bernardes et al., 2019; Boyer et al., 2020; Bradford et al., 2017) and could significantly impact salespeople (Arciniega et al., 2021; Burhanuddin et al., 2022). However, when used correctly, virtual and e-learning technologies could serve as a

powerful enhancement to traditional training by reducing the time expenditure of trainers and increasing the information retention of students.

Technology helps increase retention through repetition and the gamification of training topics. Traditional face-to-face training increases retention through instant feedback, mentoring, emulation, and follow-up reinforcement (Alioon & Delialioğlu, 2019). Blended learning methods allow the best of both virtual and face-to-face learning while minimizing the downsides of each (Crosthwaite et al., 2021).

### **Personal and Organizational Factors Affecting Training Success**

The training method is not the only precursor to salesperson success. Charoensukmongkol and Pandey (2020) showed that raw talent and a thirst for a challenge are also at play during training exercises. While it has been demonstrated that natural talent and challenge readiness positively affect self-efficacy, successful sales presentations happen more frequently when students do not have raw talent or challenge inclination. Trainees who invested more in their training research and practicing the concepts taught had far better results in their sales presentations. Concepts such as communication skills can also benefit from trainee self-assessment and practice (Cave et al., 2007).

Training transfer, the rate at which trainees carry over lessons learned during training to their job duties, is affected by many factors. According to Kodwani and Kodwani (2021), company culture, training awareness, and level of trainee involvement positively affected training transfer (de Brito Lima et al., 2021). One of the significant factors of training transfer, at an organizational level, was discovered to be the general

training environment, including rewards, systems, peer acceptance, and encouragement from supervisors. Another factor was training awareness. Training awareness involves preparation for training and the information provided about the training program, content, promises, instructors, methods, and perks. Kodwani and Prashar (2019) showed that trainee confidence was bolstered by their efficacy, which is partially affected by the preparation and orientation of trainees before training and ongoing reiteration of motivating factors. Trainers who nurture trainees before, during, and after the training program can also affect participant efficacy.

There is a consensus among researchers that training information should be ongoing, supported by supervisors and peers, and not a one-time occurrence if the training is to make it to the job. Lask et al. (2012) claimed that organizations need to be more aggressive and thoughtful about their sales training to provide a full range of sales skills and collaborate between sales process stakeholders to ensure the program is relevant, helpful, and tailored by trainee feedback. Ongoing product knowledge training was found by Fu et al. (2013) to be significant to sales consultants and had a notable positive effect on their sales performance. Massenberg et al. (2017) found that peer support and positive attitudes about learning positively affected training outcomes.

Sales coaching is a topic many managers wish they knew more about. Successful coaching is tied to overall success in managing salespeople. Coaching is the process of instilling in trainees the tools, information, and awareness of opportunities they need to better themselves (Nguyen et al., 2019). Sales researchers have studied coaching for

decades and have found that it affects many aspects of performance and satisfaction, including motivation and optimism (Onyemah, 2009).

Feedback is not a new concept for training success. Lee and Gillen (1989) revealed that the six attributes which contributed to success were self-confidence, perseverance, energy, a hunger to excel, a high work ethic, and competitive nature. The authors posit that self-efficacy and performance are related when salespeople are given control through intrinsic and extrinsic feedback. Self-confidence and self-efficacy can be learned, turning pessimism into optimism, which increases motivation and achievement (Schulman, 1999). Sales success is also often accompanied by a type-A personality characterized by many of the six attributes mentioned above (Lee & Gillen, 1989).

Salesperson attitude and perceptions about their organization and products significantly impact their ability to sell successfully. Fallah et al. (2018) wrote that organizations focusing on solving needs in their market and providing a creative sales environment positively impacted sales personnel market orientation, self-efficacy, creativity, and sales performance. Gammoh et al. (2018) stressed that how salespeople perceive value in the product they sell has a marked effect on their ability to sell it. The boost in confidence from selling a premium product and making a healthy wage positively affects sales performance (Keränen & Liozu, 2020). When salespeople identified with the brand or product and believed in it, they had a better experience selling, higher performance, and better job satisfaction.

It is necessary to evaluate all ancillary personal and organizational factors that may affect training outcomes. Companies provide an average of 30 hours of training per

person annually (Kodwani & Kodwani, 2021), while only a small percentage of training lessons make it to the job. Training programs must begin with an adequate training orientation to help improve trainee outcomes (Aqmala & Ardyan, 2019) and include collaboration, engagement, mentorship, accountability, and follow-up to maximize the success of training personnel.

### **Transition**

Section 1 of this study included the background of the problem, problem and purpose statement, population and sampling, nature of the study, research question, and the interview questions for managers and sales personnel. Section 1 also included the conceptual framework, operational definitions, assumptions, limitations, and delimitations, followed by the significance of the study, which consisted of the contribution to business practice and implications for social change. The last part of Section 1 was a review of professional and academic literature, beginning with an explanation of my chosen conceptual framework and the effectiveness of training methods, comprised of the following four subsections: (a) traditional training methods, (b) virtual training methods, (c) hybrid training methods, and (d) personal and organizational factors affecting training success. The review provided a detailed background as a foundation for the topic of sales training methods and their effectiveness.

In Section 2 of this qualitative research study, I began by presenting an introduction to the project section, restated the purpose, the role of the researcher, and a description of the study participants, followed by: (a) a further explanation of the research method and design, (b) population and sampling, (c) a discussion about ethical research,

(d) data collection instruments and techniques, (e) data organization and analysis, and (f) reliability and validity. The final subsection is a transition and summary.

In Section 3, I began by presenting the findings from my research, the application to professional practice, and the implications for social change. I finished Section 3 by discussing recommendations for action and further research, my reflections, and the study conclusion.

## Section 2: The Project

Sales managers in the United States provide training to their sales personnel in many ways. The methods of training they select often fail to provide a lasting impact on their trainees because of generational and optimum personal training preferences. Many sales managers lack the ability to provide the proper mix of training methods to best reach their trainees and to ensure that the information makes the transition to regular job performance with customers. There are also personal and organizational factors influencing training transfer and the long-term information retention of concepts included in the organization's training program.

### **Purpose Statement**

The purpose of this qualitative mini-ethnographic multiple-case study was to explore strategies used by sales managers that combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. The targeted population was comprised of up to eight sales managers and up to 10 sales personnel from two U.S. insurance companies who had established balanced sales training curricula and experienced success producing productive and confident salespeople. The implications for positive social change included the potential to improve salespeople's confidence and competency, thereby improving consumers' knowledge and transparency about their buying decisions, providing consumers in local communities with greater value in their purchases.



### **Role of the Researcher**

In this qualitative research study, my role was to collect, interpret, and analyze the data obtained through participant interviews. In interpreting the data, I was responsible for the validity and reliability of the study, compiling the data, and rendering practical research for business practice, as described by Karagiozis (2018). Yin (2018) discussed a five-step process of analyzing the data: (a) compiling data, (b) disassembling data, (c) reassembling data, (d) interpreting data, and (e) drawing conclusions as to the meaning and intent of participants during interviews. Interviews were selected for data collection to help improve the validity and reliability of the data collected (Hofstra et al., 2018).

Researching human subjects requires additional protocols to mitigate potential risks to the participants, their families, and society. Cragoe (2019) referenced *The Belmont Report*, which made specific recommendations about research involving humans, defining three basic ethical principles: (a) respect for persons, (b) beneficence, and (c) justice. These recommendations specifically target the role of the researcher to respect and protect the participants' autonomy, conduct the research morally, and ensure that the research benefits are fairly distributed. I abided by the principles of *The Belmont Report* during my research activities.

My career experience prompted me to choose the topic of this study. My background consists of over 30 years in sales, sales training, marketing, and executive management. As a researcher with extensive experience in direct proximity to my study topic, I paid close attention to my personal bias and followed an interview protocol to mitigate the risk of data contamination, remained consciously objective, and mixed the

participants between those I knew and those I did not know. I conducted interviews to explore the sales training phenomenon in-depth and to collect enough qualitative insights to achieve data saturation for a mini-ethnographic multiple-case study.

### **Participants**

The participants in this study consisted of eight sales personnel and two sales managers working at two insurance companies in the United States. The companies selected were screened to ensure that they used a mix of traditional (face-to-face) and virtual sales training methods. To provide a stable foundation of participant criteria, I only selected those with 5 or more years of experience as either salesperson or sales manager. Participants were employed by organizations in existence for more than 5 years and that employed 20 or more salespeople. Participants also had completed the company's training program and were willing to discuss their experiences in detail.

To facilitate finding participants, I sought participants through LinkedIn while ensuring that the chosen interviewees had adequate knowledge about the chosen subject. Screening for adequate input helps researchers make sure interviews have enough content to align with their research objective (Yin, 2018). The participants of this study were assured that their identities would be hidden from publication. Reinforcing confidentiality can help interviewees feel open to thoroughly discussing the research topic (Siedlecki, 2022). The target sampling was randomly selected from respondents; I chose male and female participants equally.

Establishing a positive working relationship with research study participants is necessary for qualitative research, mainly when using interviews to gather personal

experiential data. Transparency, empathy, and respect are essential to building positive relationships and maximizing the opportunity involving research interviews (Brown & Danaher, 2019). I built rapport with the interview participants throughout the interview process through discussions to inform them of the process, their importance in my research, the steps I would take to ensure that their input was private, and the next step in my process.

## **Research Method and Design**

### **Research Method**

Of the three research methods, qualitative, quantitative, and mixed methods (Strijker et al., 2020), I chose the qualitative methodology for this study to more thoroughly explore my identified phenomenon and to help me understand the human behavior behind it (House, 2018). According to Powell (2020), qualitative researchers obtain data from participants that explain behavior. Using a quantitative study would require answers to closed-ended questions and testing hypotheses about the variables' characteristics or relationships. House (2018) explained that quantitative research involves data control and measurement. In quantitative research, data are collected from large numbers of participants to analyze the relationship between variables and test hypotheses (Creswell & Creswell, 2018). Quantitative methodology was not appropriate to reach my goal of understanding the phenomenon and effects of sales training methods on the participants' lives. Mixed-method researchers use both qualitative and quantitative methods to analyze complex research questions (Archibald & Onwuegbuzie, 2020). A mixed-methods study is used when qualitative, or quantitative, research is not enough

individually to adequately address the research question, and a significant gap exists in the extant literature (Cameron, 2018). The mixed-methods approach was not appropriate in my research because the existing literature was adequate and my purpose did not involve analyzing large amounts of data from a large population. In this study, I investigated the effects sales training has on sales personnel. I explored how sales training affected salespeople's behavior, lives, and families, providing a valid reason for using the qualitative methodology. The research study consisted of open-ended questions in semistructured interviews to collect data, which I analyzed to identify successful strategies that organization sales leaders use to train their personnel. From the data collected, I discuss the apparent themes that emerged regarding considerations used when mixing traditional and virtual sales training methods for maximum sales personnel performance and confidence.

### **Research Design**

I used a qualitative mini-ethnographic multiple-case study design and collected enough data to achieve data saturation, where no new information was detected (Saunders et al., 2018). The three qualitative research designs I considered were mini-ethnography, case study, and phenomenological. Researchers use ethnography to investigate the relationship between a group of people and an aspect of their lives (Harwati, 2019; Lapshun & Fusch, 2021). In this research study, I explored how the participants' sales training offered by their employer affected their performance, confidence, and general family life.

A multiple-case design is an investigation of individual cases over a period of time (Pathiranage et al., 2020). A phenomenological design involves in-depth interviews and the analysis of data to discover the experiences of participants who took part in the phenomenon (Tomaszewski et al., 2020). Using a phenomenological research design would have necessitated the use of data analysis to focus on the personal meanings of unique experiences, whereas the experiences and culture of the sales community might have been overlooked. I considered the phenomenological design and decided against it because it would have lacked focus on the overarching context of the phenomenon that salespeople experience as a result of their sales training as a group or culture.

I decided to use a hybrid mini-ethnography and descriptive multicase study design to explore how sales training strategies affect sales personnel at work and home. I chose a mini-ethnographic descriptive multicase design because I wished to identify any common groups and individual trends. As discussed by Lapshun and Fusch (2021) and Manterola and Otzen (2017), researchers use an ethnographic design to study a phenomenon in context over time.

### **Population and Sampling**

The population consisted of two sales managers and eight sales personnel, which was enough to achieve data saturation, chosen from two insurance companies in the United States. I interviewed two sales managers and eight sales personnel in this study. Each company was at least 5 years old, and the sales participants had at least 5 years of experience in their role in the insurance industry, had completed the company's sales training program (or administered it), and were willing to discuss their experiences in

detail. To achieve data saturation, I interviewed enough managers and personnel that no new information was apparent, as described by Saunders et al. (2018).

Sampling is the process of selecting a sample of participants from the population and is essential to provide accuracy for a research study (Bhardwaj, 2019). The sample for my research possessed criteria that aligned with my research problem and question (Campbell et al., 2020; Ellis, 2021). According to Bhardwaj (2019), sampling techniques include probability sampling and nonprobability sampling. Probability sampling includes simple random sampling, including with and without replacement, and stratified random sampling, either proportionate or nonproportionate. Probability sampling also has linear, circular, cluster, and multistage subcategories. Nonprobability sampling includes purposive, convenience, snowball, quota, and consecutive subcategories. I chose the nonproportionate stratified random sampling technique for this research study. To avoid gender bias in my research, I selected from within male and female subgroups in the population and randomly picked an equal number of each to interview (Bhardwaj, 2019).

### **Ethical Research**

Conducting ethical research is essential when dealing with human research subjects because of the difficulty of the participants' complete understanding (Pope, 2019) and should include protecting their rights and privacy expectations. I followed Walden University's Institutional Review Board (IRB) procedures governing research to ensure that my study was conducted according to federal guidelines (as described by Dutka, 2022) to protect participant rights and privacy, following the approved selection plan and informed consent for any gathered data (as suggested by Biros, 2018).

The informed consent form was provided to my selected sample of two sales managers and eight sales personnel. As the sample participants returned the informed consent form, I began scheduling interviews. According to Perrault and Keating (2017), informed consent forms generally contain an introduction to the research topic, requirements to be a participant, the study purpose, procedures for conducting the research (including time estimates), a complete list of interview questions, the voluntary nature of the study, potential risks and benefits, payment, protection of participants' rights and privacy, contact information, and a method of obtaining the participants' confirmed agreement. The form also includes a statement of how participants may withdraw from the study at any time and the disclosure that the completed study will be shared with the participants once it is completed. Participants were allowed to withdraw from the study by sending me an email or calling me to communicate their wishes.

The identities of participants and companies were kept confidential and only referenced in the study documents as codes. For example, the study showed S1 for the first salesperson and SM1 for the first sales manager, instead of their actual names. The interviewees' contact information has been kept separate from research data and protected by a password. This information will be kept for 5 years to protect the confidentiality of participants and then permanently destroyed.

I offered a \$20 gift card of choice to research subjects, as a gesture of gratitude for participating in the research study, and I honored any participant's request to be removed from the sample. This study did not contain participating business names, individual names, or any specific identifying data other than a participant code.

The Walden University IRB approval number for this study is 10-20-22-1042439.

### **Data Collection Instruments**

I was the primary data collection instrument, responsible for collecting data through semistructured interviews conducted by telephone and by virtual meeting, according to the participant's preference and capability. The use of semistructured interviews provided boundaries to keep the conversations focused on my prepared questions while allowing for open-ended answers (Yin, 2018). In addition to asking the interviewees my prepared questions, I explored ancillary ideas, as Khan (2014) suggested, that I discovered during the participants' answers, to better understand the phenomenon. After obtaining the participants' permission, the interviews were recorded and transcribed for data analysis. After interview questions where the answers were open to interpretation, I confirmed my understanding with the participant through member checking. Researchers confirm their interpretation of interview responses with participants to make sure that answers are recorded accurately and to avoid misunderstanding the interviewees' intent (FitzPatrick, 2019).

All data collection followed the same format and analysis to increase consistency and research reliability, a process described by Braaten et al. (2020). Following the interview protocol (see Appendix), the interview process proceeded on the agreed-upon scheduled date and time for each participant. The interview protocol concluded with the use of member checking, which enhances reliability and validity in qualitative research.



### **Data Collection Technique**

The sales managers and sales personnel selected were interviewed using a semistructured interview process designed to allow for answers to open-ended questions about their experiences conducting, or participating in, their organization's sales training program.

I did not conduct a pilot study. All data gathering was within the scope of my primary research study. I collected data from my contact records and online sources, such as LinkedIn, to identify companies and employees for participation. To collect research data, I used semistructured interviews with open-ended questions. My interviews consisted of eight questions for managers and five questions for sales personnel to discover each participant's experiences in their role regarding sales training methods and how they had affected them professionally and personally. Participants were allowed to use performance reviews and other documents they may have deemed necessary to help them answer my questions. Participant answers were audio recorded and confirmed to ensure my understanding of their specific meaning. The primary method of audio recording was the use of an Apple iPhone 11. The secondary audio recording method was the online Zoom meeting service, transcribed by Otter.io. I took notes during the interviews and used the feedback from multiple participants to provide supporting data for triangulation.

Following the interview protocol (see Appendix), I began with introductions, followed by a review of the signed consent form and a review of the protections disclosed. I covered privacy and the participants' rights to withdraw at any time, a

disclosure that the interview would be recorded, and the rest of the form in its entirety. Before beginning the interviews, I asked participants for permission to proceed to audio record the interview, and then I began by asking my first question. An interview protocol is a disclosure of the interview process in detail, for the purpose of helping the interview proceed as intended and to show those reviewing the research that the findings could be replicated by following organized steps (Yeong et al., 2018).

Moser and Korstjens (2018) stated that one of the benefits of using semistructured interviews as a data collection technique is the flexibility in participant answer capabilities while maintaining some structure to stay within the framework intended. Alshenqeeti (2014) revealed that one of the drawbacks of interviews, as a data collection technique, is the possibility of participants feeling pressure to answer a certain way because they are not anonymous to the researcher. Another possible disadvantage is the possibility of embellishment or falsehoods told to enhance the participants' stories.

Confirming and validating participant answers is called member checking, which researchers use to compare and demonstrate their understanding of the participant's intent (FitzPatrick, 2019). Member checking involves collecting extra data from participants mitigating potential researcher bias and verifying the interviewee's answers as accurate (Brear, 2019). Member checking helps ensure accuracy and increases the validity and reliability of research obtained from interviews (Santos et al., 2017). I conducted member checking in my study by providing participants a summary of my interpretations of their responses to the interview questions via email and requesting their verification of my

interpretations either in a short phone discussion or via email. Participants had the opportunity to provide additional information during the member checking process.

### **Data Organization Technique**

After audio transcription, I organized my data and protected it to ensure participant confidentiality. Yin (2018) described the process of protecting interviewee privacy involving organization and password protection measures. I coded the data to help me categorize answers to my interview questions for use in analyzing the data. Coding organizes data into categories arranged by themes so that the data can be analyzed consistently (Williams & Moser, 2019). I used NVivo software to manage and organize my research data into themes because qualitative researchers gather significant amounts of data, as described by Dhakal (2022). Data organization techniques help researchers review, analyze, and report findings obtained during research interviews (Watkins, 2017). My research files and data will be stored for 5 years behind password protection, in accordance with the Walden University IRB requirements for participant privacy.

### **Data Analysis**

Data content analysis involves identifying themes and patterns in gathered information to satisfy the research question and align with the research study problem and purpose (Yin, 2018). Data content analysis is one of the most common methods of analysis in qualitative research (Renz et al., 2018). The data in my study were solely derived from participant responses to interview questions.

I used NVivo software for coding, mind-mapping, and identifying themes. I focused on the key themes. NVivo is a qualitative and mixed-methods data analysis software program used to help researchers analyze and find key themes from sources like interviews and other unstructured data gathering techniques (Dalkin et al., 2020). After entering all data into the NVivo 12 software program, I organized the data into themes and subthemes to make the discovery of emergent commonalities or consistencies easier and legitimize findings.

Yin (2011) discussed a 5-step process for analyzing data, which includes: (a) compiling the data, (b) disassembling the data through codification, and identifying themes, (c) reassembling through context analysis, and identifying patterns, (d) interpreting the data, and (e) concluding the data. I began by loading my data into NVivo and used the program to disassemble the data into themes. Then I grouped the data by emerging patterns until primary and secondary themes emerged and mapped those themes to my research question, identifying corroborating references in the recent extant literature and my conceptual framework to solidify my identified themes as credible.

To decrease bias and increase conclusion reliability, I triangulated the data before making conclusions (Moser & Korstjens, 2018). Renz et al. (2018) identified the four categories of triangulation as (a) methodological triangulation, (b) investigator triangulation, (c) theoretical triangulation, and (d) data triangulation. Data triangulation involves using data from different sources at different times. Theoretical triangulation involves using different theoretical perspectives, and investigator triangulation is with multiple investigators. Methodological triangulation involves using different

methodologies in approaching a single research subject. I triangulated findings to enhance the reliability, credibility, and confirmability of information, as described by Renz et al., using methodological triangulation.

### **Reliability and Validity**

Qualitative research requires a level of trustworthiness, which includes components of reliability and validity (Johnson, et al., 2020). Moon (2019) identified the components of reliability and validity as (a) dependability, (b) credibility, (c) transferability, (d) and confirmability, which was further corroborated by Johnson et al. (2020) who discussed the qualities needed during the collection and analysis of data.

#### **Reliability**

Reliability in research involves dependability. Reliable information can be reproduced with a low level of variability. If information is reliable, there is a high probability that it can be reproduced (Bishop & Boyle, 2019) and is therefore dependable (Luamba, 2019). Reliability is essential for business practice usage, so business managers can dependably use my research and obtain similar outcomes for their organizations. To increase reliability, I used a simple replicable procedure (see Appendix), which included the use of a common transcription program called Otter.io. The Otter software is cloud-based and simple to use. Otter accepts audio recordings and then transcribes the speech to text, automatically identifying different voices and allowing for tagging text with the speaker's name or code. After turning audio into text, I loaded it into the NVivo software for processing, identifying themes, and analysis. The use of commonly available software and clearly defined procedures helped increase the reliability of my research.

### ***Dependability***

Member checking of the data involves clarifying confirmation from the data source, so that misinterpretation can be mitigated. Brear (2019) stated that member checking increases the dependability of research obtained from interviews so that the findings can be trusted. Dependable information can be audited and verified as consistent with the research presented (Moser & Korstjens, 2018). By including several layers of data confirmation, including member checking, and final verification of the researcher's interpretation, the research conclusions can be based on valid data and correctly interpreted assumptions (FitzPatrick, 2019). I enhanced the dependability of my research by conducting member checking.

### **Validity**

Research validity involves credibility, transferability, confirmability, and data saturation. Validity begins with participant selection, ensuring that participants are selected in an unbiased and unmanipulated manner to eliminate data source tampering (Kenny, 2019). FitzPatrick (2019) stated that research validity involves the correctness and accuracy of the research, which involves the data source and extends to data gathering, organizing, analyzing, and interpreting. Valid or accurate research contains true and pure information without bias (Jordan, 2018). It is the researcher's responsibility to ensure the accuracy of their study while taking steps to eliminate their prejudice or contamination of the interpretation of gathered data (FitzPatrick, 2019). Valid information in ethnographic work is free from bias, accurate, trustworthy, and dependable

(Jones & Donmoyer, 2021). I enhanced validity in my study through member checking and following consistent procedures to organize and analyze the data.

### ***Credibility***

Credibility involves the integrity or trustworthiness of the research and ensuring that the findings are a true and correct representation of the data. Research credibility is described as the degree to which the research data appears accurate when viewed by the interviewee or participant (Yin, 2018). Member checking and transcript review are two methods researchers can use to validate their recorded data with the data source to make sure the recordings are credible. Member checking is the process of reading back researcher interpretations to the interviewee to verify if they are correct or need modification (Motulsky, 2021). Another way researchers can improve credibility of their findings is through the process of triangulation. Triangulation matches multiple sources together to verify if the data is consistent from each, enhancing research quality and credibility (Whitmore et al., 2019). I used member checking to enhance the credibility of my study.

### ***Transferability***

Transferability involves future research and the ability for a qualitative research study to be applied outside its stated geographic, focus, and procedural boundaries to have far-reaching effect in other areas. Transferability is the degree to which the study is relatable by other scholars and can be recreated to some extent in other similar research areas (Marshall & Rossman, 2016; Sinclair et al., 2018). Researchers can enhance transferability through deep investigation and reporting on multi-faceted interviewee

responses, following the research where participant answers lead. I increased the transferability of this study by providing detailed descriptions of each step in my research process so that future researchers can more easily replicate my results and determine the applicability to their research.

### ***Confirmability***

Confirmability involves accuracy and is a major component of validity. Accurate findings most closely represent the participant's feedback and avoid researcher bias and creative data manipulation. Researchers review their data thoroughly to ensure clarity and accuracy (Solli & Hvalvik, 2019). Following an interview protocol, member checking and transcript review help ensure confirmability. I used member checking to enhance the confirmability of my study.

### ***Data Saturation***

Data saturation is the point where enough data has been obtained that no new information is discovered (Nelson & Squires, 2017; Yin, 2018). Mazerolle and Eason (2018) stated that in qualitative research to show validity, data saturation is necessary because it demonstrates the thoroughness of data collection. I gathered enough data to a point where further data did not expose any new insights on my subject phenomenon.

## **Transition and Summary**

In Section 2, I presented my purpose statement, researcher's role, participants, and the research method and design. I discussed the research study population and sampling, ethics, data collection instruments and technique, data organization and analysis, and addressed reliability and validity. Qualitative research includes an array of



data that can seem overwhelming to organize and use in making conclusions. I discussed a software program, NVivo, which I used to help me code, organize, and analyze the data gathered from my interview research. The intent of my focus on validity, reliability, and reduction of bias was to make sure that my findings were accurate and reproducible in business practice in the sales industry.

Section 3 includes my purpose, presentation of my findings, application to business practice, the implications for social change, recommendations for action and further research, reflections, and conclusion. I provided my insights and discussed recommendations for sales managers to implement strategies that my research indicated would be successful in increasing sales personnel productivity and confidence.

### Section 3: Application to Professional Practice and Implications for Change

#### **Introduction**

The purpose of this qualitative mini-ethnographic multiple-case study was to explore strategies used by sales managers that combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. I collected data from eight salespeople and two sales managers who had at least 5 years of experience in their role working for a company that had been in business for at least 5 years and who had completed or administered the company's training program. The findings showed the best use of virtual and traditional training methods that sales leaders use to create comprehensive sales training programs for insurance agents. Three main themes emerged from the data: traditional training for learning interpersonal and sales skills, virtual training for learning technical or product information, and hybrid training to maximize the benefits of both virtual and traditional training methods. Traditional training methods included face-to-face, classroom, role-playing, ride-along on the job, and mentorship. Virtual training included self-paced video, online, and live screen share technologies. Hybrid training included a mix of traditional and virtual training methods and proved preferable for the best of both worlds.

#### **Presentation of the Findings**

The research question for this study was the following: What strategies do sales managers use to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel? Participants had to meet the following criteria: have at least 5 years of experience in their

role as a sales manager or salesperson, be presently employed by an insurance company that was at least 5 years old, and have completed or administered the company's sales training program. I conducted 10 individual semistructured interviews with members of sales departments from two different insurance companies. I interviewed eight sales personnel, asking them five questions each, and two sales managers, asking them eight questions (with follow-up questions as needed). To protect the identities of the research participants, I listed the salespeople as S1, S2, S3, S4, S5, S6, S7, and S8. I also listed the sales managers as SM1 and SM2 to protect their identities. I thematically analyzed the data using the NVivo software and identified three main themes: traditional training for learning interpersonal and sales skills, virtual training for learning technical or product information, and hybrid training to maximize the benefits of virtual and traditional training methods. Table 1 includes the themes, the number of participants identifying each theme, and the occurrences of the themes.

**Table 1**

*Frequency of Themes*

Themes	Number of participants identifying the theme	Number of occurrences
Traditional training for learning interpersonal and sales skills	10	231
Virtual training for learning technical or product information	10	68
Hybrid training to maximize the benefits of virtual and traditional training methods	9	34

The conceptual framework for this study, ALT, aligned with the participants' responses. ALT pertains to a situation where leaders provide adaptive coaching,

according to trainee needs, to help them overcome obstacles and remove barriers to production. Ideally, adaptive leaders will exhibit four crucial characteristics: trust, confidence, optimism, and resilience (Peesker et al., 2019). The findings were consistent with research by Peesker et al. (2019), in which salespeople valued the traditional training methods of coaching, bonding, mentorship, and problem-solving activities that built their confidence. However, participants noted that virtual training helped them learn the product and technical information.

### **Theme 1: Traditional Training for Learning Interpersonal and Sales Skills**

Sales leaders should identify student learning styles and tailor a mentor-driven training program to maximize sales personnel production and confidence. All participants confirmed that live instruction was a key component of learning sales and interpersonal skills (body language, building rapport, and handling objections). S2 commented, “The benefit of having face-to-face training is it can give you insight into the trainer's personal experience that may help you overcome something.” S6 commented that they liked face-to-face training because it provides the opportunity to ask a veteran salesperson about recommended sales approaches, reacting to body language, and successful sales techniques. S7 mentioned that traditional training allowed for easy correction, saying, “I'm honestly doing the side by side, which has, I think, made a significant difference in my sales.”

Participants, including sales personnel and sales managers, agreed that mentorship by a veteran sales trainer is crucial to learning sales concepts because it is ideal for instant correction, learning behaviors, adapting to body language cues, and overall human

interaction. Participants also mentioned that it helped to create a working relationship with sales trainers to learn how to overcome rejection and the stressful situations that come with a sales job. SM2 emphasized that the three pillars of sales training are effort, sales ability, and technical knowledge, saying,

three pillars, or whatever analogy you want to use. But it's the effort for the number of sales calls. It's the sales training or sales ability for the close ratio. And then it's the technical knowledge for the average dollar per sale.

SM2 concluded that effort could not be taught, sales ability is best taught traditionally face-to-face, and technical or product information is best taught virtually, in a self-paced manner. SM1 stressed the importance of one-on-one mentorship to teach sales concepts and presentation skills to close sales, saying, "it's not going just to be a one-and-done type situation; it's going to be an ongoing mentoring and tutoring into what they're trying to do and how they're trying to build their business."

Face-to-face training and mentoring also open up support for emotional situations like losing a sale or struggling to stay motivated. S8 stated, "when you see it, and, you know, you have a mentor and they're like, well, don't worry, you know, we'll get another one." Some stuff like that is kind of hard to impart in training, if they're not there to see that to fill in the ugly part, and on the other side, the exhilarating part.

Sales can be an emotionally challenging career because of constantly dealing with rejection and striving to close sales. It is beneficial to have someone there to help make sense of the problematic situations that salespeople may experience. S8 emphasized that learning on the job with a mentor was vital because it helped model what the closing of a

sale should look like and helped them learn how to get past objections, which was a significant factor in raising their level of confidence in performing the job. S5 said, “your role as a manager is to encourage them to get back up on the bike, get back up on the horse, and keep going.”

A commonly identified problem with traditional face-to-face training is that the training program's success is highly dependent on the quality of the trainers. S3 commented that the trainer quit after their second month at the company. S5 said the trainers were not well suited for the role, and that mentoring was horrible because the company promoted successful salespeople to the trainer position. Often, a good salesperson is not necessarily a good manager or trainer, and they may try to maintain their sales while teaching others. S3 added that one of their trainers was distracted and “really don’t want you there,” alluding to the trainer’s sales appointments interfering with the training schedule.

Another drawback to face-to-face training came from the COVID-19 pandemic when personal interaction was severely limited. S3 commented about traditional training: “it was hard to hear and especially with everybody wearing a mask, and I thought it wasn't as effective as actually being on the Zoom calls.” S3, S5, and S6 said that they liked Zoom because they could see each other, ask questions, and get insight from more experienced agents. S3 continued, “I liked the Zoom; it was probably the most beneficial training I've ever had.” Zoom, a highly successful screen-sharing online meeting platform, came into mainstream focus during the pandemic as a tool to facilitate live meetings in a virtual environment. Both sales managers interviewed said they used live

Zoom meetings to help them stay connected to their salespeople, especially during the pandemic. SM1 said that virtual technology had been a great assistance in training, explaining, “I can share my screen to show an example to show a direction that we're going to take, or they can share their screen. And I can walk them through step by step, what they need to do.” The subthemes for traditional training included mentorship and personal connection, faster closings and higher production, real-world scenarios, presentation skills, and so forth (see Table 2).

**Table 2**

*Traditional Training Subthemes*

Subthemes	Number of participants identifying the subtheme	Number of occurrences
Mentorship and personal connection	10	45
Faster closings and higher production	9	26
Real-world scenarios	8	27
Presentation skills	8	15
Helps build confidence	8	20
Allows for instant correction	7	21
Help overcoming objections and rejection	5	13
Helps learn to get referrals	3	4
Better information retention	2	3
Good for teamwork	2	3

*Connecting Traditional Training to the Literature*

Traditional sales training prepares sales personnel for a career selling products and services—any time human interaction is necessary. In a qualitative research study, Peesker et al. (2019) found that salespeople valued coaching most, followed by bonding, mentorship, and problem-solving activities that built their confidence. The participants in my study concurred with Peesker et al. by mentioning mentorship and personal

connection more often than any other reason for preferring traditional sales training methods. Traditional training involves the kind of activities that show and perform job duties for trainees by a veteran salesperson or experienced trainer. The participants in my study felt that it helped them close sales faster, master presentation skills, build confidence, and overcome rejection because the training was centered around real situations with real customers. Bernardes et al. (2019) stated that millennials prefer on-the-job training because they enjoy having an experienced mentor to emulate to succeed in their sales careers. One of the most significant precursors to salesperson success, according to Bradford et al. (2017), is the ability to apply learned skills to day-to-day job duties. Bradford et al. showed that in-person coaching and mentoring during live sales appointments increased trainee knowledge transfer and self-efficacy. Traditional training methods readily involve collaboration and engagement, which Alioon and Delialioğlu (2019) found to increase student self-efficacy and reduce anxiety.

SM2 stated, “the more connected you are with the people you're training, the better their performance. It is difficult to be connected with your agents if you are training virtually.” S8 said that they like to “sit with the trainer as they present to the client.” S6 added, “I think confidence is gained by the face-to-face interaction.”

### ***Connecting Traditional Training to the ALT***

Smothers et al. (2020) stated that positive feedback from leaders helps trainees improve confidence while teaching sales personnel how to adapt their level of confidence to suit each sales situation can improve successful sales closings (Heiser & McArthur, 2020). Using traditional training methods allows an experienced trainer to help students



learn in an environment where mistakes can be instantly corrected and productive behaviors exhibited.

## **Theme 2: Virtual Training for Learning Technical or Product Information**

Sales training involves more than just learning how to sell and having a sales career. Sales training also entails compliance, product knowledge, and staying current on technical information about the product, industry, market, and client. SM2 stressed the importance of technical training, saying, “if the student or the agent comes to the table, knowing that the technical background of the product, it just makes the sales training easier.” With product specifications and suitability information, respondents did not feel the same about their preferred training methods as they did for sales concepts.

Sales and company leaders are consistently looking for ways to make their processes more efficient and scalable for growth. Virtual training methods allow for various flexibilities, including time, geography, physical disabilities, and on-demand review of information. SM2 said, “the only time I’ll use virtual is for purely technical concepts. Things that don’t involve sales training, per se, are really more product line.” S7 commented, “the good thing about the virtual is, if it’s recorded, you can always go back to it.”

Training methods are not just a matter of preference. Sometimes a training method may be necessary due to physical disabilities. S4 commented, “my learning modalities have changed. Because I’ve got multiple sclerosis, that’s why I’m in the wheelchair.” Virtual training benefits organizations, trainers, and trainees in many ways. The top ways in which virtual training excels are the ability to revisit information,

comfort, and convenience, and as a tool to facilitate live face-to-face training during COVID-19 or with other limitations that prohibit in-person training. Baldwin et al. (2017) uncovered that nearly 75% of managers were dissatisfied with their company's training outcomes because retention and learning transfer were low, and they felt that technology could help.

The use of VLEs makes it possible to teach students simultaneously around the world. A VLE is also helpful for instructors when providing trainees with learning materials, tracking progress, logging grades, and monitoring feedback (Rivas et al., 2021). S1 said, “virtually, you see it, there's a lot more pie charts, you know, slideshows, things that catch your attention.” S2 said, “I can get it done in the middle of the night without, into, you know, it affecting my productivity.” S5 commented about virtual training methods, “product knowledge goes through the roof.” SM2 stated, “your sales ability improves the number of sales you make, your technical knowledge will increase the average dollar per sale.” It is crucial to understand what training method best facilitates each facet of training objectives and tailor the training program accordingly. The subthemes for virtual training included able to revisit information, structured curriculum, live is good alternative to face-to-face, comfortable, and so forth (see Table 3).

**Table 3**

*Virtual Training Subthemes*

Subthemes	Number of participants identifying the subtheme	Number of occurrences
Able to revisit information	5	10
Structured curriculum	4	5

Live is good alternative to face-to-face	3	11
Comfortable	3	7
Time flexible	3	4
Can accommodate disabilities	2	3

### ***Connecting Virtual Training to the Literature***

Virtual training technologies allow many flexibilities that traditional training does not. Top on the list is the ability to revisit information for future reference and use virtual technology as an alternative to face-to-face instruction. Gourlay (2021) wrote that digitally mediated learning helped teachers when the response to the COVID-19 pandemic forced teachers and students to stay apart. While virtual technologies, mixed with live instruction via Zoom or other platforms, may be a viable alternative to traditional face-to-face training, participants in my study agreed that virtual technology is best for learning technical information. Sorong and Sutradhar (2021) found that students using exclusively self-regulated virtual training programs felt isolated and insecure.

### ***Connecting Virtual Training to the ALT***

Product knowledge is the main topic that allows adaptive leaders a flexible array of choices. Having product knowledge enables salespeople to select different products or services that can fit a variety of customer situations. The use of virtual training allows salespeople to learn product knowledge in a flexible, self-paced environment, where they can revisit the information on demand as necessary. Adaptive leaders have more variety of adaptive choices as product knowledge increases. SM2 said, "I think it's much easier to do sales training, and the person has a firm understanding of the product."

### **Theme 3: Hybrid Training to Maximize the Benefits of Virtual and Traditional Training Methods**

Company leaders can only move some training to virtual methods and maintain a quality sales education. Sales production requires the sales personnel to be adept and successful in interacting with their prospects. Learning the interpersonal skills involved in human interaction requires a more hands-on approach, while product knowledge can be taught using a self-paced virtual method. The combination of traditional face-to-face and virtual self-paced training methods provides the organization scalability and efficiency while providing the student with the mentorship needed to master the art of sales.

Sales managers like the flexibility of options regarding sales training but have particular recommendations for the training program structure. SM1 commented, “detailed training comes virtually most all the time because it allows for everybody to be able to take the notes,” adding, “but the far majority of the time, in the actual sales process or and working with the sales, people themselves, we're doing a lot of one on one.” SM2 said, “the number of sales tells me how well I'm doing at the sales training. The dollar per sale tells me how good I'm doing on the technical training.”

Students preferred the hybrid training model to exclusively virtual or traditional models (Yu, 2020). Including virtual methods adds significant flexibility and efficiency to a traditional training program. Some benefits include the increased geographic replication of training (Rocha et al., 2019) while reducing the training time necessary for preparing new personnel. Blended learning shows increased student engagement and interest (de Brito Lima et al., 2021). Y. Chen and Song (2018) found an 80% information

retention loss after 90 days from the conclusion of training. To increase retention, Y. Chen and Song recommended tailoring training to fit trainee attributes, leveraging technology to help solidify training concepts, and following up with regular reinforcement on the job.

S2 said, “there’s no one size fits all.” An essential feature of any training program is accommodating different learning styles. S5 stated that a crucial factor is “taking the time to find out people’s learning styles and what makes them tick.” Both sales managers expressed the importance of tailoring at least some of the training program to fit different learning styles, making it more effective for the salesperson and the organization.

S8 summed up the overall sentiment by saying, “so you have the perfect world in theory, and then you have the messy practical world,” explaining that each is important. All participants expressed a similar sentiment that sales training is best when it includes on-the-job instruction for sales concepts and virtual means for learning technical information or product features. However, S1, S2, S3, S5, S6, S7, and S8 expressed that the success of the training programs they experienced was directly correlated to the quality of trainers and the structure of the training program in general.

### ***Connecting Hybrid Training to the Literature***

A historical review of training and development practices showed a shift over the past 100 years from focusing on efficiency to concentrating on the student (Bell et al., 2017). Developing a trainee’s interpersonal skills produces a much more valuable human resource than someone who can regurgitate information. The mentorship, teamwork, and quality education provided to salespeople can perpetuate and spread to other personnel

and invigorate the organization. Teamwork brings people together to collaborate and share what they've learned with each other, gaining valuable feedback (J. Chen, 2021). S5 compared sales training to "apprenticeship, where they're making sales." S6 said they like the face-to-face approach "because if it's a sales technique, I want to be able to roleplay that or speak to others that may have tenure." Collaboration is the most significant predictor of training program success (Öncü & Bichelmeyer, 2021). SM2 stated, "the best measure of success on how the training is going is the actual ability to make sales. You want people to be in that competitive metric, performance-based mindset as early as humanly possible."

Hybrid training, virtual and technology-based training injected into traditional face-to-face training methods, is a preferred combination. Students preferred the hybrid training model to exclusively virtual or traditional models (Yu, 2020). Organizational leaders may experience a reduction in training time necessary to prepare a new salesperson by offloading fundamentals, compliance, and product knowledge to a virtual self-paced model while leaving the sales concept instruction to a veteran trainer.

### **Connecting Hybrid Training to Adaptive Learning Theory**

Adaptive leaders need to use a variety of methods to be effective when training salespeople. To maximize training program success, trainers must navigate many organizational and societal situations to administer training in an effective way. Training programs, that begin with training orientation and may include collaboration, engagement, and mentorship, help improve trainee outcomes (Aqmala & Ardyan, 2019). Leaders who teach trainees how to adapt to suit different sales situations can improve

successful sales closings (Heiser & McArthur, 2020). Hybrid training programs provide the widest array of options that sales leaders can use to select the right method for a variety of situations, teaching trainees how to adapt quickly in a controlled environment.

### **Application to Professional Practice**

The results of this qualitative multiple-case study may help company and sales leaders maximize the effectiveness and minimize the time and expense of their sales training programs. The purpose of this qualitative multiple-case study was to explore strategies that sales managers in the insurance industry use to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. The findings and recommendations in this study may provide business leaders and sales managers with practical insights they can follow to improve their current sales training programs.

The strategies sales and business managers use to develop and implement sales training programs have shifted from efficiency and cost as an organizational focus, to developing the salesperson long-term. The findings of this study indicated that traditional face-to-face instruction is best for teaching interpersonal skills and sales concepts. In contrast, virtual self-paced methods work well for teaching technical information and as an augmentation of traditional mentorship. This study was focused on discovering the strategies sales managers use to balance the available training methods. I found that mentorship could be one of the most effective strategies involved in sales education because, through mentorship, a trainer can learn the salesperson's preferred learning styles. Tailoring training methods to facilitate the student, in varying degrees, helps

create a relationship with the salesperson and gives them the best chance of success. In speaking with sales managers, the bonds formed through mentorship can increase production and confidence, reduce attrition, reduce anxiety and stress, and solidify a salesforce as a cohesive unit working on a common goal.

### **Implications for Social Change**

The implications for social change for this study are that companies that employ salespeople can directly impact the communities around them. Salespeople are sons, daughters, fathers, and mothers who make up part of the local communities. Quality training programs can help trainees succeed in their careers, which affects their families in positive economic and emotional ways, helping the community around them. Effective training programs also positively affect organizations, which could enhance their abilities to hire more staff and bring additional employment opportunities to the community.

### **Recommendations for Action**

The study findings could provide a guide for business leaders to effectively plan their training programs while ensuring they provide the maximum benefit to trainees and the organization's production. I plan to share the results of this study with business leaders through seminars, speaking at industry conferences, and in a digital and printed training guide. The participants in this study shared valuable insights about sales training methods from both salesperson and sales manager perspectives. Individual preferences, medical situations, and geographic differences create demand for training flexibility to maximize the effect on trainees and their careers. Training programs cost organizations a



significant amount of money to implement. The success or failure of training programs can have serious repercussions. A training program can affect:

- employee attrition
- perception in the community
- perception in the industry
- social media exposure
- employee satisfaction and morale
- employee wages
- community employment
- employee confidence
- product-to-consumer suitability
- company revenue

My recommendations for action involve five basic steps to devise the proper training program mix of traditional and virtual methods. These steps emerged from interviews with the sales personnel and sales managers who participated in my research.

- Identify the optimal ways each salesperson prefers to learn and retain information. This does not need to dictate the training program structure but can help trainers when the mentoring portion of training begins. Are trainees more tactile, auditory, or visual learners? Do they do well with self-paced training or need guided activity?
- Structure the training program based on the kind of information to be taught. Consider serving it virtually for basics, details, product information,

compliance or legal rules, and other technical information. Virtual online, pre-recorded multimedia platforms called VLEs can house and serve repetitive information to trainees effectively if they involve a variety of mediums. Text, voice narration, charts and graphs, video, pictures, diagrams, music, and sound effects all flavor virtual training and make it more interesting. Show the learner a timeline of information to be taught and future mentorship activities.

- Introduce traditional training to solidify virtually learned information and help students acclimate to the new live training model. Use this time to show new sales personnel the support available to them and what kind of organization they now work for. Immerse trainees into the actual sales process as soon as possible, with a sale of their own as the goal. The introduction to mentorship is a chance to begin creating long-term bonds with the salesperson and give them the sense of a higher purpose, their reason for persevering through tough times.
- Pair salespeople with a trainer/mentor who is dedicated to their success and can balance their sales time with training time. The number one reason for traditional training failure is to employ trainers who are not well suited for their role, are motivated by their own sales, or do not have the experience to train others in sales adequately.
- Use on-the-job training to model what the job should look like and achieve success as fast as possible. Mentors should model successful behavior for trainees, handling the sale process from start to finish in the beginning. Then,

slowly transition from the instructor to the trainee performing and the trainer observing. Salespeople should have sales closing quickly and learn to pattern their behavior after the successful instructor's behavior.

The continued use of virtual technology could provide variety in the training and management program by involving frequent Zoom meetings to enhance face time and the opportunity to ask questions live. Mixing live virtual, live face-to-face, and self-paced virtual methods could provide a multi-faceted training program that will maintain trainee interest and prevent monotonous repetition.

### **Recommendations for Further Research**

I anticipated three research limitations in Section 1 of this study. I identified the number of companies, the number of participants, and the study duration as limitations to insight into the phenomenon. During my research, I addressed the limitations and some areas of possible future research into sales training methods. The size of the study population, duration of the study, other methods and designs, and different perspectives using various theoretical frameworks could enhance the understanding of sales training by stakeholders.

My recommendations for future research involve adding a quantitative approach to provide more details about the financial implications of my research to organizational and salesperson benefits. A quantitative study of different training program methods and sales numbers could provide the extra data to support this qualitative study's findings and motivate organizational leaders to spend the time and resources enhancing their training programs. It would be beneficial to expand further sales training research to include

various industries. In addition, it may be interesting to follow a few new inexperienced salespeople through their entire training process over a longer time to discover more nuances in how they learn best and the effects of different training situations on their lives.

### **Reflections**

My doctoral journey began as a fulfillment of something I have been chasing my entire adult life, achievement. As I sat next to my father in the hospital, lamenting that I had not become a doctor like him, I heard his advice as if it was a foreign notion. He said I could become a doctor without being a physician, to reach the pinnacle of my education in the field of my choosing. Even after his passing, the idea stayed in my thoughts, and I enrolled the following spring semester at Walden University in the doctor of business administration program. The program was entirely virtual, which was one of the prompts for my study topic. Because of the COVID-19 pandemic restrictions, I could not attend an in-person residency, which I was very much looking forward to attending. The lack of live, personal mentorship made me appreciate my past sales training even more. So, I decided to study it deeper to discover how other salespeople felt about their preferred training methods.

As a manager, I always identified with a specific leadership method, but I only knew what it was once I studied leadership theory in this program. Adaptive leadership was the style my staff voted that I used most often. So, I decided to explore sales training methods through the adaptive leadership lens.

## **Conclusion**

The purpose of this qualitative mini-ethnographic multiple-case study was to explore strategies used by sales managers that combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. Three main themes emerged from the data analysis: (a) traditional training for learning interpersonal and sales skills; (b) virtual training for learning technical or product information; and (c) hybrid training to maximize the benefits of virtual and traditional training methods. Using blended learning methods allows the best of both virtual and face-to-face learning while minimizing the downsides of each (Crosthwaite et al., 2021).

By implementing training methods based on information type and trainee preferences, organization leaders can maximize the benefits from their training investment and the overall training programs' success. Adequate in-depth sales training produces productive and stable sales personnel, which can enhance the lives of their families and other residents of the local communities.

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## Appendix: Interview Protocol

Participant #: \_\_\_\_\_ Organization #: \_\_\_\_\_

Date: \_\_\_\_\_ Start Time: \_\_\_\_\_ End Time \_\_\_\_\_

1. Begin Recording
2. Welcome and introductions.
3. Review Business Problem
4. Review Research Question
5. Review Participant Form
6. Disclose the Participant and Organization ID number used for confidentiality
7. Ask the role-appropriate Interview Questions for managers or personnel
8. Ask follow-up or clarifying questions as needed
9. Record any nonverbal observations made during the interview
10. Discuss member checking with the participant
11. Provide researcher contact information to the participant
12. Conclude interview and thank the participant

**Business Problem**

The specific business problem is that some sales managers lack the strategies to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel. Therefore, the purpose of this qualitative mini-ethnographic multiple-case study is to explore strategies used by sales managers that combine and balance virtual and online resources with



traditional face-to-face training methods to increase the productivity and confidence of sales personnel.

### **Research Question**

What strategies do sales managers use to combine and balance virtual and online resources with traditional face-to-face training methods to increase the productivity and confidence of sales personnel?

### **Open-Ended Interview Questions**

#### ***For Managers:***

1. What sales training strategies do you currently use to train sales personnel?
2. How do you feel about virtual training strategies?
3. What do you think about traditional face-to-face training strategies?
4. What strategies do you use to balance virtual and online training with traditional face-to-face training methods?
5. Which of your training strategies have been most effective?
6. How do you assess the effectiveness of your strategies?
7. How do your salespeople respond to your current training methods?
8. What else would you like to share regarding sales training strategies that I have not asked you about?

#### ***For Sales Personnel:***

1. How has virtual sales training and face-to-face sales training methods affected your productivity?

2. How has virtual sales training and face-to-face sales training methods affected your confidence on the job?
3. Explain how well you learn and retain information from both face-to-face instructor training and virtual online training methods.
4. How has your organization's current sales training program helped or hindered your ability to be productive?
5. What else would you like to share regarding sales training methods that I have not asked you about?