



SALES TRAINING PROVIDER EVALUATION

Kurlan & Associates, Inc.

ES Research Group maximizes the value of the relationship between the sales training buyer and the sales training provider through our knowledge base, experience, and guidance in making the right decision.

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1 Provider Overview

The content contained in Sections 1-7 of this report was furnished by the provider and edited by ESR.

Synopsis:

Kurlan & Associates is a global, full service, results-oriented sales development firm. Since 1986, Kurlan has served clients in more than 200 industries and in companies ranging in size from start-ups to multi-billion dollar corporations. Kurlan & Associates specializes in sales force evaluations (diagnostics to answer questions about performance, people, systems, strategies, processes, and sales force architecture), sales force infrastructure (sales process, sales recruiting process, sales pipeline, forecasting, CRM, metrics, compensation), sales selection (criteria, candidate pool, assessments, selection, on boarding, retention), sales leadership development (assessment, training, and coaching), sales management development (assessment, training, and coaching), and sales development (assessment, training, and coaching). The firm's course methodology is based on CEO Dave Kurlan's book, *Baseline Selling – How to Become a Sales Superstar by Using What You Already Know about the Game of Baseball*, which describes an approach that places focus on improvement.

Mailing Address: 114 Turnpike Road
Suite 102
Westboro, MA 01581
USA

Number of full-time employees: 10
Number of Trainers/Consultants (F/T): 4
Number of Trainers/Consultants (P/T): 3

Location(s):

Westboro, MA, USA

Phone: 508-389-9350
Web Site: www.kurlanassociates.com

2 Clients and Revenue

In Clients and Revenue, you will gain perspective on the scale of the sales training provider's business. Does the firm do business locally or globally? What kinds of training is this provider positioned to offer?

Clients:

Number of active clients	50
Number of new clients	
Added in the last 3 years	67
Added this past year	25

Revenue:

Revenue Total (in U.S. Dollars)	\$2,300,000
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Types of Training:

Public Programs	10%
On-site Training	35%
Consulting/Coaching	15%
Distance Learning	30%
Speaking Engagements	10%
Other	0

Geographical Revenue Composition:

USA	96%
Canada	0
Latin America	0
Europe	2%
Mid-East	0
Africa	0
Asia/Australia	2%

Revenue Generated By:

Employees	100%
Contractors	0
Resellers/Agents	0

3 Courses

Understanding the focus of the sales training provider's offerings is more than just knowing what courses the firm makes available to its clients, it can also provide insights on the organization's instructional design capabilities.

Number of Courses by Target Audience:

Direct Sales	14
Sales Management	8
Inside Sales	6
Resellers or Channel Partners	1
Customer Services	0
Tech Sales	14
Other	0

Customized Courses? Yes

Custom Course Description: All private training is customized to fit the client's sales process, products/services, and market.

No. of instructional designers employed or contracted: 0

Instructional design techniques employed: None

Topics Covered (by number per year):

Basic Sales Skills	8
Advanced Sales Skills	6
Business Skills	0
Presentation Sales Skills	1
Negotiation Skills	1
Opportunity Management Skills	1
Account Management Skills	1
Technical Matters	0
Executive Sales Skills	0
Channel Partner Management Skills	1
Leadership Training Skills	1
Sales Management Skills	8
Coaching	1
Competitive Selling	14

Consultative Selling	14
Train the Trainer	1
Other	

4 Measurement

Measurement focuses on how a provider evaluates the effectiveness of its sales training initiatives. By looking at both pre- and post-training statistics, you will be better equipped to determine whether the provider is in fact able to measure a net gain in knowledge. In addition to examining whether or not the provider measures its effectiveness, ESR also reviews how objective and empirical those measures are.

Client's engagements measured by:

Lead Acquisition	Yes
Lead Qualification	No
Lead Conversion	Yes
Account Planning	No
Territory Planning	No
Pipeline Forecasting	Yes
Best Practices	Yes
Product Knowledge	No
Sales Presentation	No
Methodology Adherence	Yes
Knowledge of Training	Yes
Coaching Effectiveness	Yes
Other	

Percentage of engagements using formal measurement: 50%

Processes/Metrics/Methods Employed:

Formal goal-setting process	Yes
Methods to achieve goals	Yes
Metrics with calculation definition	Yes
Methods for selecting goals	Yes

Training Materials Employed:

Electronic	Yes
Instructions for Consultants & Facilitators	No
Menu of Metrics	Yes
Number of Discrete Metrics	Yes
Collection Methods	Yes
Formulas for Calculation of Metrics	Yes
Electronic Tools for Collection	Yes
Electronic Tools for Calculation	Yes
Interface to CRM, SFA, or other tools	No
Method for analyzing metrics	Yes
Written guidelines for recommendations	No
Documents for consultants & facilitators	No
Training for measurement participants	Yes

Implementation of training measurement program includes: Measurements are defined with the creation of a staged, criteria-based, visual pipeline. Kurlan defines the pipeline requirements by stage and salesperson, and creates metrics to keep the pipeline filled. The firm also measures various metrics to measure the effectiveness of the program, including year over year, month over month, and team over team metrics from various changes to the pipeline, to conversion ratios, to revenue and margin.

5 Technology

Many levels of technology can be linked by sales training. These range from live but remote sessions to pre-recorded sessions to online testing. Very often, technology is used for learning reinforcement. This section takes an in-depth look at what technologies are provided by the training firm.

Technologies employed:

Curriculum planning	No
CD or DVD training	No
Audio-only training	Yes
Courseware via webcast	Yes
Online recorded courseware, on demand	Yes

Technologies cited are:

Stand-alone, independent of live training	No
Preparatory for live training	No
Reinforcing live training	Yes
Included in live training price	Yes

Percentage of clients using distance learning:

75%

CRM interface/integration approach and technology description: Kurlan recommends CRM, and has stand-alone solutions that are independent of CRM and integrate with Landslide CRM.

Solution is (a) stand-alone, (b) via CRM, (c) both, or (d) neither:

Salesperson performance assessment	Both
Salesperson coaching	Stand-alone
Pipeline management & assessment	Both
Training intervention reinforcement	Stand-alone
Methodology reinforcement	Stand-alone
Sales training reinforcement sales tips	Both
Process/workflow management	Both
Contract administration	Neither
Activity documentation	Both
Organization productivity assessment	Stand-alone

Interface provided for the following CRM systems:

Oracle/Siebel	No
Salesforce.com	No
Microsoft Dynamics CRM	No
Netsuite CRM	No
Sugar CRM	No
Sage Software CRM	No
Landslide	Yes
White Springs	No
SAP	No
Other	

SCORM-compliant technology: No

6 Learning Reinforcement

In Learning Reinforcement, you are given an opportunity to review how the sales training provider continues knowledge reinforcement after the formal class has ended. In the absence of reinforcement, behavior changes that have come about as a result of training typically die out over a 90-120 day period. This section captures the tools, techniques, and processes that the provider uses for both formal and informal reinforcement.

Formal learning reinforcement program offered? Yes

Formal learning reinforcement process description:

Kurlan provides a series of follow-up, topic-specific modules via webinar, as well as coaching or a series of live reinforcement training sessions and coaching, depending upon the client's location, budget, and salespeople.

Tools used for learning reinforcement:

Email, GoToMeeting, Wistia, Objective Management Group Progress Assessments, Objective Management Group Sales Track, Objective Management Group Visual Pipeline Baseline Selling Field Guide, Objective Management Group SalesMind

7 References

As part of the evaluation process, providers are asked to submit the names of references who are familiar with the firm's offerings. ESR has contacted each reference on the provider's list to confirm, to the best of our ability, that the information furnished is complete and accurate.

8 Analyst Evaluation

The ESR Analyst Evaluation offers a detailed view of the training provider, its products and services, and qualitative and quantitative observations from the analyst's perspective.

Overview

David Kurlan & Associates, Inc., also known as Baseline Selling, which has been in business since 1985, uses a baseball analogy to structure and deliver both its selling methodologies and its sales training. Baseline Selling founder Dave Kurlan has been in sales since he was 19, selling knives door-to-door. In that first selling job, he decided that he wanted to be in the business of coaching people in the selling process, perhaps because in his first six months of selling this product, his average far exceeded that of his co-workers. Although he did not understand why, it was clear that his intuitive selling process was highly effective with customers. His mission at that early point became to gain an understanding of his process and share it with other salespeople. Perhaps the most interesting aspect of Baseline Selling and its founder is that Kurlan entered sales as a way to overcome his personal introversion and shyness, and to learn to interact effectively with other people.

It is interesting that Baseline Selling's unstated objective is to teach people that they can set, achieve, and exceed personal goals—in whatever they are doing. In this light, successful selling is merely a process of setting, diligently working towards, and achieving personal goals.

Kurlan was a diehard Red Sox fan, and he played baseball. Using baseball as a metaphor for the selling process was a natural fit. His book, *Baseline Selling – How to Become a Sales Superstar by Using What You Already Know about the Game of Baseball* has sold more than 20,000 copies.

Kurlan & Associates' objective is to marry the client's existing selling process with Baseline Selling, extracting from the existing process those components that are both familiar and effective, and inserting into the selling process essential components of Baseline Selling that are missing. Baseline Selling includes default components, or steps, to get from first to second to third base and on to home plate, in the selling process. These default steps may be enhanced with or replaced by the client company's own steps to move the sale forward.

Baseline Selling often finds that many companies have the appropriate steps, deliverables, and actions in place, but those components of the selling process are out of order, occurring in the wrong place in time, and often for no particular reason.

A major objective of the Baseline Selling process is to first rearrange the steps or tasks of the client's existing selling process into the proper sequence. Kurlan finds that often the right tasks are already defined by the client's process, except for determining when a task is really complete and allocating time inappropriately.

A major objective and differentiator of this process is the marriage of the essential Baseline Selling defined tasks to the client's existing information requirements and processes. Kurlan classifies the essential tasks as: (1) Required or necessary for the client's internal sales management; or (2) Essential to the client's sales and marketing personnel for their understanding and effective execution of the selling process. Kurlan makes this determination in conjunction with the client's management.

According to Baseline Selling, the biggest obstacle to salespeople selling effectively, and in the selling process chain, is first line sales management.

In addition to founding Kurlan & Associates, CEO Dave Kurlan also established Objective Management Group (OMG), a leading provider of sales force and sales management assessments. OMG has collected performance statistics on over 500,000 salespeople and sales managers at over 8,500 companies. Data consistently shows that first line sales management is the weakest link and the most resistant to change in the selling chain, within an enterprise. This group's resistance to change tends to arise from a fear that their management flaws and inadequacies will be exposed in the training process.

When Kurlan & Associates gets selected, the most often cited a reason is the firm's holistic approach to selling and sales management. Clients are also enamored by the fact that Kurlan & Associates adapts the selling process to their existing, familiar processes while ensuring that necessary and elemental changes to that selling process are implemented.

Kurlan & Associates offers a total of 25 course modules to its clients.

Baseline Selling is one of the few selling processes that include financial training and financial justification. Salespeople are taught about return on investment (ROI) and are tutored on the essential data points for salespeople to collect from their clients.

ESR Capabilities Ratings:

The ratings below are based on a scale of 1 through 5, as follows:

(5) Industry leading (4) Very strong (3) Competitive (2) Adequate (1) Inadequate or not available

Uniqueness: 4

Kurlan is very unique in its approach to transferring knowledge to a sales force using a baseball analogy.

Innovation: 4

In general, Kurlan would not be judged as new or unique in its methodology, however its approach—offering the rudiments of financial evaluation to help salespeople advise their clients—is rare in this industry.

Differentiation: 4

Kurlan’s approach significantly differentiates this firm from its competition. It is unique in its use of analogy and in the approach of starting with the client’s baseline process and incorporating new material.

Internationalization: 2

Kurlan’s training materials and content are only available in English.

Effectiveness: 4

This is a well-established, full-service firm that has been proven to deliver significant value to its customers.

Strengths

Kurlan & Associates is a company engaged in both consulting and training. Its length of time in business has enabled the firm to build a very large, robust course module library that can be mixed, matched, and customized to meet the unique needs of the client. Its consulting approach at the start of most engagements allows Kurlan to tailor course modules to the client requirements.

ESR regularly highlights the importance of considering training and consulting firms like Kurlan & Associates. This provider gets the job done and done well when there is a good fit between client requirements and the firm’s capabilities.

As mentioned earlier, the firm places a strong emphasis on recruitment and selection and has the tools and experience to deliver. What is the value of investing time and money in sales training when two or three of your ten salespeople are not suited for the jobs they hold? ESR has spoken with other sales trainers who license these selection tools. They are rated highly.

Challenges

Kurlan's business model is heavily biased towards live and telephonic human intervention. The firm has further development ahead in the area of electronic learning aids for virtual learning or post-live training follow-up and reinforcement.

When to Consider this Firm

ESR recommends Kurlan for organizations that need to enhance and upgrade, rather than replace, their existing selling process, either for reasons of employee knowledge retention or company uniqueness. This is an area where Kurlan excels.

When to Consider Alternatives

ESR recommends considering alternatives to Kurlan for large companies when there is a requirement for a broad and deep overhaul of the entire selling approach, which might include, for example, sales, marketing, and services integration and their supporting tools and processes.

To the Point

Kurlan is a medium-sized provider with a rich and long history in the sales training business. The firm is excellent at capturing the important elements of an existing selling process that must be retained while reorganizing and supplementing with new, original material.

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