

# Chart Learning Solutions

## CASE STUDY

*Business training today for  
results tomorrow.*

Achieve off-the-chart sales  
results while radically  
reducing training costs with  
a Performance Assurance  
System  
that solves the problem of  
underperforming  
sales people.



## The Client Challenge

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*How can we train our geographically scattered staff and coach optimal performance with limited resources?*”

### Client Background

Belmark is a custom packaging manufacturer of labels, flexible packaging and folding cartons. Offering “Label Solutions to Business Problems,” Belmark’s corporate headquarters are located in DePere, WI, and they also have a manufacturing facility in Phoenix, AZ.

### The Challenge

Belmark’s management recognized the need to increase the professionalism of their 35 remote sales representatives and to bring on new sales reps at a faster pace. Belmark leads their industry in new technology investments, and it is critical that their sales team is equipped to verbalize what that technology means to their customers, allowing them to go to market differently.

Several sales training programs were considered, evaluated and interviewed. We learned of Chart Learning Solutions thru an e-mail marketing piece by Lorna Riley, titled “Selling in Turbulent Times.” Karl Schmidt, President of Belmark, was intrigued by the article and felt it was applicable to our business challenges.



## The Solution

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*Each sales rep is part of building best practices...giving us exceptional interactive workshops and better ways to think and act.*

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Chart Learning Solutions (CHART) was launched to the Belmark sales team with the initial presentation being made by Ms. Riley. Prior to this launch the Belmark Sales managers were trained by CHART on how to be effective coaches for their individual sales teams. To meet the challenge of fitting this additional task/expectation into an already full schedule, we rolled out the program slowly with the goal of completing one unit each week, including the quiz and Application Activity associated with the Course.

A reminder was placed on everyone's Outlook calendar to reinforce the importance of staying on track.

At the conclusion of each Course, our sales managers/coaches conducted an Application Accountability meeting. We quickly learned that these meetings were most effective with 2-4 team members, with the benefit of collaborative learning and the opportunity to review specific challenges together. Additionally this team session allowed the coach to fully know each rep's comprehension with an opportunity to clarify, if necessary.

Belmark holds two sales meetings annually to review sales and operational trends, equipment and marketing updates, etc. A CHART Workshop was added to the agenda, with a facilitator assigned to review the most recent assignments. Each sales rep is part of building our best practices in terms that we use every day. This has contributed to giving us exceptional interactive workshops that engage everyone and build consensus among the group for better ways to think and act. These “Best Practice Tools” were added to the CHART Learning Community. Examples of team interaction included role play, small group break-out sessions, skits,

## Solution

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*Chart gave us the blended on-line and live coaching structure we needed with its Performance Assurance System.*

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full group discussions, games, videos, and in some cases—highlighting a sales rep by assigning them a topic to review that they excel at in the field. Peer-to-Peer learning is very powerful!

Finally, as the sales management team traveled in the field they reinforced CHART on their sales calls, such as pre-call preparation and setting a clear objective for each visit. It's exciting to hear the CHART terminology being used on a daily basis by our sales team, which continues to build upon that learning by being more professional, more inquisitive, and more thoughtful.

Top leadership support and on-going accountability was critical to the success of CHART at Belmark. CHART gave us the blended on-line and live coaching structure we needed with its “Performance Assurance System.”

The Regional Sales managers were accountable to the Sales Director, and were also instrumental in developing the workshop material for each of the sales meetings based on what they had learned independently on-line from CHART.

The challenge at each sales meeting was to keep the team motivated, engaged, and to have fun! Additionally the sales team knew that CHART was going to be reviewed at each meeting and they were given specific pre-workshop topics for preparation and review prior to the meeting.



## Results

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*...business continued to grow in double digits after we started CHART, compared to an industry growing in single digits.* ”

During a time where the US economy had a downturn, Belmark's business continued to *grow in double digits after we started CHART*, compared to an industry growing in single digits” states Jeff Dowd, Director of Sales & Marketing. “Our strategic discussions are much more concise, focused, and successful. The vocabulary, thought processes, and most of all the confidence of our sales force have all improved dramatically.”

We have also made CHART part of Belmark's onboarding process. New sales reps have clearly integrated into our company faster because of the common vocabulary, sales process, and strategy that CHART provides with their turn-key blended system.

In October 2015 we completed 'Round One' of CHART Learning Solutions Sales Cycle-Management program. At that same time we launched 'Round Two' and we realigned all of our sales members to new Coaches. We also asked two of our most veteran sales members to step into coaching roles. This realignment gives everyone new life as they go through the material. 'Round Two' will help ingrain the concepts into our culture and will enable us to further customize the material through CHART's numerous learning portals.

Since launching CHART's professional development program to the sales team, sales have grown over 50%. We did that by continued investment in technology and coaching the “best feet on the street” in our industry.

## Results

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*.....my greatest reward has been watching the sales team prepare and present a topic with a heightened sense of well-being and pride...*

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### 2017-2018 Updates

Our sales team is currently working on Round Three, Sales Cycle Management, coached by peer leaders.

New Sales Hires and others in the company who have expressed an interest in sales – are completing the sales curriculum, one course per month with a “future leader” coach.

Our Customer Service Team completed Round One of Service Cycle Management and will begin the Service Self-Management curriculum this fall.

Customer Service Managers are working thru the Self-Management courses, ranked by priority and interest. We started with Service Attitude, and we are now working on Responsible Initiative. Upon completion, two of the Customer Service managers are customizing the Talking Points, adding best practice activities that will be combined into one document when we roll out to the Customer Service Team in October.

We also have two Leadership teams with five members in each team, working thru the Leadership Development Curriculum at the rate of one course per month. This was a one-year course offered January – December.

It’s hard to put a value on elevating someone’s self-worth, and that is *not* something you plan for when you are purchasing a sales training program.



Jane Zilles  
Belmark