Running a Successful
Sales Training Program

Use this checklist to run a successful sales training program. Add or remove items based on relevancy to your program and modality.

PROGRAM

- ☐ Define program goals and outcomes, including metrics to track
- ☐ Define curriculum
- ☐ Define any tailoring or customization requirements, timeline, and resources
- ☐ Define target participants
- ☐ Define manager involvement, for example:
    - ☐ Enable managers with Coaching for Action & Accountability manager training prior to seller training.
    - ☐ Prepare managers with Train the Application Coach (TTAC) when they'll conduct application coaching *– see Application Coach Prep*
- ☐ Define training modality (ILT, VILT, Self-Study, Hybrid)
- ☐ Define facilitation needs *– see Facilitator Prep*
- ☐ Define application coaching needs *– see Application Coach Prep*
- ☐ Define executive sponsor involvement:
    - ☐ Executive sponsor to speak at participant kickoff session
    - ☐ Executive sponsor to create welcome video for learning management system (LMS)
    - ☐ Executive sponsor to send communications *– see Participant Communications*
- ☐ Assign engagement champion and related tasks (i.e., owner who will drive participant engagement with the training)
- ☐ Assign program logistical manager

SCHEDULE

- ☐ Create training schedule, including:
    - ☐ Participant kickoff session, prior to first delivery or module release
    - ☐ Module or program delivery (90 minutes for VILT; half-day, full-day, or multi-day for ILT; module release schedule for Self-Study)
    - ☐ Application coaching (1 hour weekly or every other week in groups of 7 or less)
    - ☐ Transition session after last application coaching session or module (only applicable if 90-Day Sales Achievement Challenge is being implemented post-training)
- ☐ Confirm delivery team and availability, including:
    - ☐ Facilitator(s)
    - ☐ Technical host(s)
    - ☐ Application coach(es)
- ☐ Complete all scheduling logistics
    - ☐ Room rentals/confirmations
    - ☐ Platform delivery links (Zoom, Google Meet, Microsoft Teams, etc.)

PARTICIPANT LIST

- ☐ Define participants, cohorts, and time zones
- ☐ Complete Participant List Template
  Includes names, email address, manager's name, cohort information (region, language, etc.).

LEARNING MANAGEMENT SYSTEM (LMS)

- ☐ Create/confirm learning program in LMS
- ☐ Tailor any modules or tools (as desired)
- ☐ Review and update all notifications/reminders in LMS
- ☐ Launch training program in LMS
- ☐ Add participants to LMS

FACILITATOR PREP

- ☐ Complete Train the Trainer (TTT) Certification
- ☐ Review all program or module walkthroughs
- ☐ Review all program or module delivery slides and run sheets
- ☐ Review all program or module content videos and tools
- ☐ Complete any tailoring or customization as required
- ☐ Update and prep for participant kickoff session (before first module delivery)
- ☐ Update and prep for transition session (after final module delivery)

APPLICATION COACH PREP

- ☐ Complete Train the Application Coach (TTAC)
- ☐ Confirm all application coaching sessions per delivery schedule
- ☐ Review videos and content for relevant modules
- ☐ Review participant application assignments for relevant modules
- ☐ Review Application Coaching Guides for relevant modules

PARTICIPANT COMMUNICATIONS

- ☐ Complete communications plan
- ☐ Send calendar invites
- ☐ Execute cascading communication plan

EVALUATIONS AND REPORTING

- ☐ Review engagement reports in LMS
- ☐ Create and administer Pulse Check Survey at end of module 2 or day 1
  Post-event feedback from participants and leaders.
- ☐ Create and administer Facilitator and Coach Insight form (after each session or as desired)
  Post-event feedback from facilitator about the session, what resonated, any challenges, support needed, etc.
- ☐ Create and administer End of Training Survey at end of training delivery
  Post-engagement feedback about content, tools, and approach.
- ☐ Set up metrics tracking

REINFORCEMENT ACTIVITIES

- ☐ Administer RAIN Mail
  Gamification via sales scenarios delivered via email and mobile.
- ☐ Set up and run 90-day Sales Achievement Challenge
  Embed learning with regular coaching, practice, and application of new skills.
- ☐ Additional learning modules to watch on-demand