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A Process-Focused Method to Accelerate Sales Skill Development

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Abstract **-** Role-play scenarios have long been used for developing selling skills. This paper examines how role-play scenarios affect the learning process and proposes an innovative, process-focused method for accelerating skill development. Drawing insights from Cognitive Load Theory, it is hypothesized that complex role play scenarios—while perhaps more realistic—inhibit initial skill development. Alternatively, simpler scenarios make it possible to increase cognitive load germane to the selling process, and accelerate development of selling skills. A preliminary test of this hypothesis provides support for the process-focused method. The paper includes suggestions to further increase the effectiveness of the process-focused method.

Keywords **-** Personal selling, Sales training, Skill development, Role-play scenario, Process-focused method, Cognitive Load Theory

Relevance to Marketing Educators, Researchers and/or Practitioners – Complex role-play scenarios can be over burdensome to a student's cognitive load when learning a new skill, thus hindering the learning process. Using the well-documented Cognitive Load Theory, this paper describes how and why sales educators can use a process-focused method to minimize cognitive burden and maximize the learning of sales skills. A preliminary test of this method on initial sales skill development provides support for this process-focused approach, opening up opportunities for future research on role-play effectiveness. Practitioners who use role-plays could employ the basic ideas used in this process-focused method and apply it to other relevant skills.

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Introduction

Role-plays have been widely recognized as an effective means to teach and improve personal selling skills (Bowers and Summey, 1983; Carroll, 2006; Castleberry, 1989; McBane and Knowles, 1994; Sojka and Fish, 2008). Role-playing helps students and professionals develop, through application, a variety of sales process skills, including listening, investigation and question sequencing. Once learned and mastered, these process-level skills can be applied in a variety of customer and product settings.

Despite the popularity of role-playing in sales education and training, less is understood about what makes role-play training more or less effective (Leasher and Moberg, 2008). The purpose of this paper is to (1) add to the understanding of how role-play ***scenario*** or ***context*** impacts the skill development process, and (2) drawing from Cognitive Load Theory, propose a simple, yet innovative process-focused method for more rapid skill development. We begin with a brief discussion of how role-play *scenario* and *context* interacts with the learning process, and proceed to an overview of Cognitive Load Theory. Next, leveraging insights from Cognitive Load Theory, we present an innovative instructional method that focuses students' efforts more effectively on skill development. Suggestions to increase effectiveness are mentioned, including the sequencing of role-plays, product variation, and altering the roles of those that quickly master the skills. Finally, we offer and preliminarily test a hypothesis regarding the learning impact of the process-focused role-play method using the SPIN Selling framework.

Scenario Use in Role-Play Instruction

Learning a process skill is arguably best facilitated when the skill is not merely demonstrated, but applied in a problem context and integrated into a real-life learning task (Merrill, 2002), and making sales role plays "more realistic" has long been of concern to sales educators and trainers (Moncrief and Shipp, 1994). However, this marriage between skill and context may confound the instructional process, especially among those with little or no professional sales experience or those learning a new selling method, creating a number of specific and identifiable challenges for educators and trainers alike.

Time and resource pressures create one such challenge for instructors (Carroll, 2006). Complex role-play scenarios require more advance preparation time and often multiple sessions to complete (Sojka and Fish, 2008). If students do not spend sufficient time preparing for complex role plays, they will lack sufficient command over the context to appropriately

apply the skills being taught (Bannert, 2002). Also, the increased preparation, practice and performance time required by more complex scenarios inhibits repetition, which is required for effective skill development (McBane and Knowles, 1994). However, the challenges created by use of more complex scenarios are not merely a matter of attention span, opportunity for repetition, and limited face-to-face class time.

Importantly, and central to the focus of this paper, sales role-plays based on complex and potentially unfamiliar scenarios force salespeople to divide cognitive resources between process and context. If the context is not already stored within existing schemas in long-term memory, it is difficult to develop process skills, due to strains on the learner's cognitive load (Bannert, 2002). Modern instruction that incorporates real-life learning tasks—such as in sales role-plays—makes cognitive load considerations increasingly more important to the design of instructional methods (van Merriënboer and Sweller, 2005).

Cognitive Load Theory

During learning, schemas are formed and explain most of the skills exhibited by those learning (Sweller, 1994). The goal of skill building is for students to develop skills or behaviors that involve the formation of automatic schemas, or patterns of behavior, which can later be applied to a variety of situations or contexts. While authentic (applied) learning tasks are ideal, the complexity of those tasks often hampers the ability to learn the skills due to the limited processing capability of the mind (van Merriënboer et al., 2003). Cognitive Load Theory is a stream of research that provides guidance for instruction, taking mental processing capacity into account and allows for optimal processing loads to better facilitate learning (Sweller et al., 1998). McBane and Knowles (1994) acknowledged the idea that cognitive overload is inherent in a role-play context where students are attempting to learn new skills.

In order to maximize skill development, and better align instructional activities with learning objectives, it is important to understand the types of cognitive load on learners, as well as their sources. Although the awareness of these distinctions is not a principal concern of learners, it should be a concern of instructors and trainers when trying to foster learning (Sweller, 1994).

Intrinsic Cognitive Load

Intrinsic cognitive load is based on the level of difficulty of the material being learned. It specifically deals with the number of elements that must be simultaneously processed and with the expertise of the learners (van Merriënboer and Sweller, 2005). The difficulty, or complexity, of the material is determined by the number of elements involved and the number of interactions, or relationships, among these elements. When intrinsic cognitive

load is high, learners will not have sufficient command over the material (Bannert, 2002) and, therefore, cannot make effective use of that material. Those who are novices must grapple with this complexity, while experts have available, automatic schemas in long-term memory that effectively simplify this information. An analogy often used is the expertise levels of a chess player. The beginner has a difficult time anticipating subsequent moves in a chess game, while a master can more easily think ahead as multiple combinations of moves are often recalled from the mind as one simple unit (Sweller and Chandler, 1994). If the intrinsic load is high due to the material's inherent complexity, the intrinsic load should be reduced (Pollock et al., 2002).

Extraneous Cognitive Load

Extraneous cognitive load is determined by the instructional design and deals specifically with the mental burdens created by how information is presented to learners (Pollock et al., 2002; van Merriënboer and Sweller, 2005). Extraneous cognitive load is higher when learners are asked to solve problems by working backward from a goal, or when they are required to search for information needed to complete a task (van Merriënboer and Sweller, 2005). Similarly, a lot of information can be presented concurrently or consecutively, yielding differences in the cognitive load placed on the learner. If the instructional format results in a higher cognitive load, the effects on learning need to be considered (Sweller, 1994).

Germane Cognitive Load

Germane cognitive load refers to the conscious mental effort dedicated to learning targeted skills (Sweller et al., 1998). Under many circumstances, high intrinsic and/or extraneous cognitive loads will hamper the learning process, while increasing germane cognitive load will foster greater learning. As these elements of cognitive load are additive, any reductions to either intrinsic or extrinsic cognitive loads will create an opportunity for more germane cognitive load (Sweller et al., 1998).

Cognitive Load in Sales Role-Plays

Reducing Intrinsic Load

Role-play scenarios or contexts that are elaborate and incorporate many details are needed to test learners' critical thinking skills and abilities to perform, but present a challenge for those attempting to learn new selling process-oriented skills. The cognitive loads imposed by real-life learning applications (such as role-plays applying specific selling techniques) can be excessive for novices, seriously hampering learning (van Merriënboer and

Sweller, 2005). In more complex role-play scenarios, learners must devote significant cognitive resources to rich contextual details related to the product, industry, competitive environment, customer, and the specific sales situation. Less complex role-play scenarios would serve to reduce a student's intrinsic cognitive load because it would allow the instructor to reduce element interactivity (van Merriënboer and Ayres, 2005). While complex scenarios are ultimately necessary to develop advanced selling skills, the interactivity between context and process confounds learning for those attempting to learn a new process. The high element interactivity caused by complex scenarios can be reduced by using a more process-focused approach (van Merriënboer and Sweller, 2005). Role-plays based on a product or scenario with which the students are familiar, and thus have existing mental schemas, make it easier for them to more quickly and effectively connect the process to the application.

Reducing Extraneous Load

Concurrent processing of the new selling skills (the targeted learning objective) and the contextual information of the role-play requires a significant mental effort, and constrains learning of the general sales process (Sweller, 1994). Thus, mental integration of a specific selling framework—such as SPIN Selling, Solution Selling, or other consultative selling methods—combined with a complex scenario or context imposes a high extraneous cognitive load (Sweller et al., 1998). Even having contextual details such as product and customer information available during a role-play would not likely benefit the learner, because simultaneously studying contextual information while engaging in the learning task is very likely to cause cognitive overload (van Merriënboer et al., 2003).

Alternatively, initial skill development using less involving contexts that the student can easily understand, such as paper clips or umbrellas, allows them to focus almost entirely on the selling process (e.g., the SPIN technique), and more effectively internalize process-related schemas (van Merriënboer and Sweller, 2005).

Increasing Germane Load

If less complex scenarios reduce both extraneous and intrinsic load, they (by definition) increase the potential for learners to direct greater cognitive resources toward the development of schemas associated with the selling process (Sweller et al., 1998). The development of such schemas is critical to sales training and education, since it allows a student to more rapidly apply a selling framework across a variety of customer and product contexts.

Decreasing extraneous and intrinsic cognitive loads does not automatically increase germane cognitive load; it merely ensures (all else equal) that more cognitive capacity is available. Whether those available cognitive resources are effectively focused on the process germane to selling skill development is a function of the instructor's ability to design a task that positively focuses effort on process learning.

The Process-Focused Instructional Method

In this section, we will outline the process-focused instructional method used to foster the learning of behavioral skills (using the SPIN Selling framework as a model) and, in the following section, discuss how Cognitive Load Theory supports the efficient and effective learning of a skill through the use of this method. The popularity and acceptance of SPIN Selling as an effective sales technique has been acknowledged by number of others (Plouffe et al., 2009; Shepherd et al., 2009), and has been a staple of corporate sales training programs for many years. The SPIN framework is built around the use of specific kinds of questions designed to help salespeople identify and raise buyer awareness of opportunities and problems, the implications of those problems, and the value of solving them. Each of these questions types—Situation, Problem, Implication, and Need-Payoff, tend to require a successively greater mastery of the SPIN process (Rackham, 1988). That is, effective use of Implication and Need-Payoff questions typically requires are higher level of proficiency than is required to effectively use Situation and Problem questions. More importantly, effective use of Implication and Need-Payoff questions are more strongly linked to success in major sales (Rackham, 1988). The goal of our process-focused instructional method is for students to begin to effectively internalize the skill so that it becomes an automatic set of behaviors, available for their use in later selling situations.

Setting Up the Role-Play Exercises

The ultimate goal is to have the students or trainees learn the skill of interest through role-play exercises so that they become proficient in using it. To begin, two volunteers can role-play in front of the rest of the class, allowing the class to observe and provide feedback with regard to the skills being taught. Alternatively, the instructor can role-play with a student to model the correct behavior, as modeling the technique will better facilitate learning as opposed to simply telling students what to do (Merrill, 2002). Ultimately, students benefit most when each has the chance to practice the skills, not by simply watching others. To that end, it is suggested that the instructor then break the class into groups of three with students playing the roles of salesperson, customer, and sales manager/coach, a technique that has been shown to be effective in selling courses (McBane and Knowles, 1994). After the

role-play is complete, the students can shift roles until each has had the chance to play the role of the salesperson. Optimally, students can play the salesperson role several times to better build their behavioral skills or proficiency in the technique as this process-focused approach requires negligible preparation time and thus can be employed many times in a single class period. Sometimes the instructor may notice certain students who have quickly demonstrated competency in the skill. In that case, it is advisable to have such students play the role of the sales manager/coach more heavily so they can elaborate on what they are observing. This will allow those students who have quickly become proficient to develop their skills further in a manner more appropriate for their expertise levels (taking expertise into account in this manner is explained in more detail in a later section).

The first part of the exercise, as described above, serves to acquaint students with the SPIN framework through a simple role-play. The SPIN framework is built around the use of questions designed to help salespeople identify and raise buyer awareness of opportunities and problems, the implications of those problems, and the value of solving them. SPIN Selling involves the use of four specific types of questions: situation, problem, implication, need-payoff. Situation questions are used to identify necessary background information, but do not provide much value for the customer. Problem questions are designed to diagnose whether or not the customer perceives that a need is present. Implication questions allow the customer to elaborate on consequences that result from these problems (often referred to as building pain). Need-payoff questions put the customer in a position to explain how the salesperson's solution can provide value to the customer, therefore involving the customer in the demonstration of that value. It is important that the students first read about and learn the SPIN framework so that they have a sufficient understanding of the different types of questions used in the technique. That way, students will have an understanding of the framework when they are asked to observe and comment on it and when they are subsequently asked to employ it.

The Salesperson's Product and Role

The products used for this method should be intentionally simplistic to avoid the burden of wrestling mentally with product knowledge while trying to develop this behavioral skill. Products can be assigned to the students, or all of the items can be presented and students allowed to choose among them. Consumer products that have been successful for developing the SPIN technique using this method include: clothes hangers, paper clips, sunglasses, USB jump drives, umbrellas, Post-It notes and insulated can/bottle holders to name a few. Students have existing mental schemas involving these products and are able to easily determine the benefits of owning or using the product.

As it is easy to imagine the customer's life or workplace without the product, it is easy to understand how the customer could be negatively impacted by the absence of it. Therefore, the student can begin to ask questions about how life without the product leads to issues (building pain) and what benefit may come from incorporating the item into the customer's life or workplace (demonstrating value). While such products would not generally require a more sophisticated selling effort in "real life," it is not difficult to creatively apply more advanced SPIN concepts (specifically, Implication and Need-payoff questions) to the context. Indeed, that is the point; students can focus on the method, rather than the context.

The Role of the Customer

Essentially, the role of the customer is to imagine life without that product and without any suitable substitutes. For example, the customer without hangers could not have an abundance of dressers or shelves in their closet to accommodate folded clothes, nor could they have a maid, butler, or mother to take care of their clothes for them. Dry cleaning can be an expensive option for maintaining clothing (allowing the salesperson to build pain financially), but it would have to be picked up without hangers (essentially, just laid out nicely in the bag). The purpose of this approach is to allow for the salesperson to establish and develop a need. When the salesperson asks thoughtful questions about problems and implications, the customer should just go along with the logic and disclose the pain associated without having the item in their life. Often, the results can be amusing, as well as instructional (i.e., they complain about how much warm beverage they end up throwing away from not having an insulated holder, or they finally realize the true purpose of that bar in their closet is for hanging clothes and not for chin-ups).

The Role of the Sales Manager/Coach

The last member of the triad is meant to observe the role-play and provide feedback through monitoring and recording the salesperson's use of the behavioral skill. Appendix A contains an instrument useful for organizing the tasks that should be performed by those playing the role of the coach (it is organized to assess the SPIN technique, but could easily be adapted to other selling methods). In the current SPIN example, coaches are asked to keep track of the number of situation, problem, implication, and need-payoff questions the salesperson uses during the role-play. Additionally, those in the coaching role can make notes on questions that were particularly good or bad, so as to provide feedback to the student playing the salesperson. The coaches should also be asked to write down ideas for questions, or opportunities, that the salesperson may have missed during the role-play. It is best to have the

students in the salesperson role evaluate their own performance before the coaches provide feedback to foster better learning.

Taking Expertise into Account

Expertise can be determined by how well students have automated the skill (Pollock et al., 2002), or in this case how well they have formed a schema to employ the selling method. Research has demonstrated that experts gain less from learning experiences more appropriate for novices, and in some cases, these experiences can have negative effects (van Merriënboer and Sweller, 2005). Thus, if students are picking up the selling method rather quickly, it may be best to let them serve as coaches for others during training. For example, for training in a method such as the one outlined in this paper, these quick learners could offer feedback to other role-players such as additional questions that could be asked (i.e., missed opportunities), more effective phrasing, question sequencing, or follow-up. In this way, their expertise is put to use in a way that benefits all involved. Those being coached will benefit from the feedback provided while the coaches further their skills through elaboration on the role-play or skill that is being observed (Good and Swift, 1996).

Continuous assessment of the students' expertise levels is important for altering the training method in this manner (van Merriënboer and Ayres, 2005). Thus, instructors should pay close attention and determine when students are effectively reaching target competency levels, which, in turn, requires that progressive competency benchmarks be established and measured. Those quickly meeting and surpassing the benchmarks can supplement the instructor as a student-coach (Good and Swift, 1996).

A Note on Variation

Varying the context in which a skill is applied is key to effective learning (Merrill, 2001). High variability does increase cognitive load, but only because mental resources must be dedicated to genuine learning, which improves the likelihood that the learners will be able to effectively transfer the skill to contexts beyond that in which it was learned. Transferability is enhanced because of more rapid schema development, which makes the application of the selling method to new and more complex situations more successful (van Merriënboer and Ayres, 2005; van Merriënboer and Sweller, 2005). This process-focused method allows the instructor to incorporate more role-play exercises during face-to-face training time as it takes less time to execute and requires minimal outside preparation, similar to the BIRP exercises proposed by Sojka and Fish (2008). Thus, while initially learning a skill, it is possible for students to participate in several, successive role-plays using different products in each round. Varying the product to build skills in this manner is

not as easily accomplished with more complicated contexts because of the preparation time, execution time and the cognitive load required.

The Chaining Technique

Because process-focused training allows for role-plays in more rapid succession, it is possible to have consecutive rounds within one training period, each with a different focus. In learning a skill or behavior that has multiple parts or elements to it, evidence suggests it is useful to break it down by asking learners to focus on developing competency for one specific part or element of a skill before moving on to the next one. For example, when teaching a method such as SPIN Selling, this can be done by focusing learners' efforts on a single type of question in the SPIN technique at a time (S, P, I and N in order) and sequencing them so that the student's effective use of one type of SPIN question leads them naturally into the next. Indeed, this "chaining" technique has shown to be effective, and has been even more effective than attempting to develop all targeted skills simultaneously (Peck and Detweiler, 2000). Most consultative selling processes require salespeople to master a number of related skills. Having students focus on a single skill in successive role-plays allows them to achieve basic competency in each skill before attempting to learn the next (Jones and Javie, 1996; McBane and Knowles, 1994). Additionally, gradually increasing the performance expectations of learners through practice in this manner should maximize germane cognitive load. This will be especially true in earlier trials, when the techniques are still novel, and thus, cognitive demand is at its highest (Peck and Detweiler, 2000). It can be motivating for students (and better facilitate learning) when they are able to effectively demonstrate the use of the skill (Merrill, 2001), such as being able to reach a target number of specific types of questions during a role-play (e.g., students are instructed to ask 5 implication questions in a particular round of role-plays). Time and practice should allow the skill to become more automatic, requiring minimal thought (Sweller, 1994) and resulting in more effective application. Alternatively, an instructor can use this process-focused method to specifically strengthen one particular element of a skill (like need-payoff questions, or building pain) when a student shows deficiency in an area.

Beyond SPIN

Instructors who use role-plays as an instructional tool could employ this process-focused method to other skills in addition to the SPIN technique. Whether one is teaching need satisfaction selling processes, problem-solving selling techniques, feature-advantage-benefit (FAB) approaches, listening skills, question sequencing or any other consultative selling method, using the

process-focused method early in training will allow students to focus more fully on the sales skills being developed.

Empirical Support—A Preliminary Test

The impact of role-play scenario complexity on rate of skill development was examined using two courses designed to teach professional selling skills, one where the process-focused method was used to apply the SPIN Selling technique (n = 22) and one where a more complex context was used (n = 19). For the process-focused method, students were allowed to choose among the following products: clothes hangers, paper clips, sunglasses, USB jump drives, umbrellas, Post-It notes or insulated can/bottle holders. For the more complex scenario (context-focused approach), students were selling a data vaulting service to a regional accounting firm. Students in both classes were required to read the same material and given the same instruction regarding the SPIN technique. Both classes consisted of juniors and seniors. The role plays were performed in student triads and recorded for later analysis. The role plays averaged 5 minutes and ranged from 4 to 12 minutes in length. None had been previously exposed to the SPIN method before taking the sales course.

Students' use of the SPIN Selling process was measured by counting the number of Situation, Problem, Implication, and Need-Payoff questions they asked. Consistent with Rackham's prescription (backed by decades of observation), those that asked more Implication and Need-Payoff questions would be deemed more proficient. This was the primary objective of the training in both classes.

Guided by Cognitive Load Theory, we expect complexity of the role-play scenario to negatively impact the rate of selling skill development. Specifically, given the same training and objectives, we expect students assigned to less complex role-play scenarios (process-focused approach) to exhibit a higher level of skill development than those assigned to more complex (context-focused) scenarios. Therefore:

> H1: Students assigned to less complex role-play (process-focused) scenarios will demonstrate accelerated development of selling skills than those assigned to the more complex (context-focused) scenario.

Results

Students whose role-play scenario was more complex asked an average of 1.9 Implication and Need-Payoff questions, while those using the process-focused

method asked an average of 5.9 Implication and Need-Payoff questions. Both means were statistically significant, as was the mean difference for the number of Implication and Need Payoff questions (combined) asked by the two groups (p=0.000).

Alternatively, overuse of Situation and Problem questions is a sign of lower proficiency, and more common to inexperienced salespeople (Rackham, 1988). Those given the complex scenario asked an average of 5.9 Situation and Problem questions, while those using the process-focused method averaged only 4.8. These results are summarized in Table 1 below. The mean difference in the number of Situation and Problem questions (combined) asked between the two groups was not statistically significant.

Table 1: Means and T-Tests for Students Using Complex Scenarios and the Process-Focused Method

	Complex Scenario	***Process-Focused Method***	***Result of the T-test***	
SPIN Question	***Mean (n = 19)***	***Mean (n = 22)***	***T***	***P***
Situation	3.1	3.8	- .980	0.333
Problem	2.7	1.0	5.274	<0.001
Total Combined	5.8	4.8	1.301	0.201
Implication	1.0	2.5	-2.808	0.009
Need-Payoff	0.9	3.4	-5.776	<0.001
Total Combined	1.9	5.9	-4.613	<0.001

While a comprehensive examination involving more empirical evidence is needed, preliminary results indicate that the process-focused method allowed students to more quickly develop proficiency in using the targeted selling process skills.

Summary

This paper draws from Cognitive Load Theory, as well as other research in sales and behavioral skill training, to propose a process-focused method for the more accelerated development of sales skills. Insights from Cognitive Load Theory, as well as our preliminary test of the impact of this method on initial skill development, provide support for this process-focused approach to initial sales skill training. Specifically, the process-focused method adjusts role-play scenario complexity based on the level of mastery of the targeted selling skills. Skills are initially developed through the process-focused

method, minimizing both intrinsic and extraneous cognitive load, thus allowing the instructor to maximize students' cognitive resources available for learning and practicing new selling skills. This focus should allow students to more quickly internalize the selling methods and/or technique being taught. Since the ability to apply a selling method across various selling situations and contexts is a critical goal of sales training, achieving competence in the sales skill of interest is the primary goal. The more rapidly this competence is achieved and mental schemas become established, the more quickly instructors can move to more realistic scenarios that provide a more challenging test for students, and the better the opportunity to develop higher levels of skill proficiency (Sweller, 1994; van Merriënboer et al., 2003). Varying the context using different products is easily accomplished using the proposed method, and it is recommended to increase the students' abilities to transfer skills beyond the role-play scenario. Instructors are cautioned against using elementary role-play scenarios with students who have demonstrated expertise in skill development. Using these students in the coaching role, where appropriate, may be more mutually beneficial to all learners. Finally, the process-focused method can be applied to other behavioral skills and techniques to increase instructional effectiveness through role-plays.

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Appendix A

Appendix A

Salesperson's name: _____

	Situation	Problem	Implication	Need-Payoff
Make a checkmark in the appropriate column each time the salesperson asks a SPIN question.				
Write a few notes or key words in this space for any of the salesperson's questions which were particularly effective.				

1. List things the salesperson handled well here:

2. List any additional questions the salesperson could have asked here:

3. List any other opportunities the salesperson missed here:

4. Below, please write any other comments that could have made this interaction more effective.

Finally, ask the salesperson how they think they did first, *then* go over this sheet with them.

Author Information

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