

NELSON invested in training their customer-facing teams to level-set the sales process across internal stakeholder groups. CPSA facilitated the training to help the world-class learning and technology company adopt a consistent, high-performance standard, while providing an opportunity for professional development for their employees to earn advanced sales designations.

CPSA Sales Training Makes the Grade at NELSON

NELSON provides world-class quality educational content and digital learning solutions from pre-kindergarten to post-secondary.

"While onboarding new team members as part of a partnership integration, we uncovered opportunities to improve training and processes within our cross-functional departments," said Julianne Isaac, Director of Sales and Training, Western Canada and Inside Team, at NELSON. *"We created a taskforce to evaluate our goals and what training was needed to level-set across our respective teams. While we had successfully onboarded partners in the past, we agreed we could further optimize the current framework."*

In addition to the impact of a cohesive, consistent approach to the sales process, NELSON wanted to invest in its consultants by shifting to a solution selling approach, recognizing the critical importance of training and developing its team members as part of the organizational culture.

"CPSA training has been well worth the time invested. We were impressed with the sessions and the strategies we can put into action right away."

Lindsay Shipman, Consultant

After evaluating different options, NELSON chose to work with the CPSA on a comprehensive training program that could serve as a level-set for all customer facing teams, not just those in sales.

"If our internal stakeholders, like marketing and publishing, don't know the language and the process for our salespeople in the field, it makes it difficult to collaborate and implement," says Isaac. *"We liked that this training level-set the framework to get everyone pulling in the same direction."*

Tackling the Fundamentals

NELSON's program started with the Fundamentals of Selling, and included pre-work,



a three-day session, webinars held at the three- and six- week marks, and a knowledge quiz. The approach was designed to reinforce and embed skills like the consultative selling process and a strategic account analysis.

"We have a complex industry that has complex needs. We have to be able to weave in our solutions or steer our conversations to meet the needs of our customers to stay relevant and on point with the market," said Jennifer Sutton, Director Marketing at NELSON. The Fundamentals of Selling training helped the sales team embrace a consultative selling model that lets them talk to solutions and get to the sell faster.

The program was designed to ensure a mix of cross-functional teams in every Fundamentals of Selling session, including managers and their direct reports, to foster valuable dialogue and interactions.

"We believed it was very important that we show our commitment at a senior level. If we are going to do a level-set then everyone has to be a part of that level-set," Isaac says. NELSON's culture and market impact is changing, and while it's too early to completely credit the CPSA training, Isaac says *"we're killing it this year"*.

Company:

NELSON

Location:

Toronto

Industry:

Education



COMMON GROUND

CPSA provides NELSON level-set training so cross-functional departments can use the same language and processes for all customer interactions.



INVESTING IN LEARNING

With on-site training, webinars and learning hub resources, NELSON has access to tools to reinforce training for ongoing skills development.



DEVELOPING SALES LEADERS

CPSA training and earning the Certified Sales Associate designation has empowered NELSON employees to continue to raise the bar as learning technology leaders in the educational sector.

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Email memberservices@cpsa.com
or call 1.888.267.2772

“Overwhelmingly, there was positive feedback to the training and the experience. It was a very successful roll out.”

Breken Finnie, Digital Solutions Manager

Embracing the Model

During their recent sales meeting, Isaac says everyone was using the language and processes learned from CPSA, including the 8-step consultative process. Additionally, during the summer planning sessions, sales teams used the Return on Time Investment (ROTI) process for their account analysis.

“At the sales conference, our marketing team included questions to ask for the 8-step consultative process during their product presentations, and our VP Finance said it was very useful to get a perspective on how we conduct our sales calls,” says Isaac.

Sales teams have also commented on how the CPSA consultative selling process is helping them have more productive meetings with their customers,

skills they learned when they’re in the field is the next step as we hit the ground for our main selling season,” Isaac says. Using CPSA call planners and coaching guides, as well as Learning Hub resources will help reinforce the model and provide ongoing reminders.

Investing in Staff

Investing in the training and development of employees is a core NELSON value. Following the in-person sessions and webinars, and to reinforce the learning pathways, the sales team are now working towards earning their CSA designations by early next year. Isaac says their VP of Sales calls those who have already taken the CSA exam, the *“leaders and pioneers”*.

“NELSON holds itself accountable to a world-class standard across the organization, and a well-trained sales team is a reflection of that investment and commitment to our customers.”

Michelle Sartor, Vice President Sales

and the account analysis process is helping them spend time in the right places, with the right people.

“Organizationally, we’ve gotten everyone behind this, which is critical to our success. Reinforcing the

“We want to give our people opportunities to develop in their career and this is one way we can invest in them,” says Isaac. *“CPSA training and the CSA designation is a nice win, as it’s something our sales team can add to their CVs, and it demonstrates our commitment to their professional development.”*

CPSA training gives NELSON the defined processes for sales and onboarding that they wanted so whenever new hires join the organization, there’s now a consistent approach. *“We have five new employees joining, and they will go through the next Fundamentals of Selling course and start on their CSA.”*

“Professional development and training remain a key initiative for us,” says Isaac, noting the management team recently completed Professional Sales Management training to help “grow our teams and make them better”. Once the level-set training is ingrained, Isaac said NELSON will look at other professional development programs such as the Certified Sales Professional designation for senior staff.



NELSON

NELSON is Canada’s largest learning technology company. The organization believes in the importance of life-long education and dedicates its business efforts to the creation of quality content and innovative solutions that support the needs of every student and educator to empower their learning success.

With more than 20,000 members across Canada, the Canadian Professional Sales Association (CPSA) sets standards for excellence in sales. CPSA helps sales professionals, team leaders and organizations accelerate sales performance and advance sales careers through training programs, curriculum development, learning resources and Canada’s standards-based professional sales designation programs.