

A Two-Week Plan For Teaching A New Salesperson About Printing

A few month ago, I wrote about the first three things a quick/digital/small commercial printing salesperson must learn about *selling*. You might remember that they were (1) to learn to approach selling as a systematic process, (2) to learn that follow-up is critical, and (3) to learn the printing company's "strike zone"—in other words, exactly what kind of projects the salesperson should be seeking out and quoting on.

This month, I've decided to write about the things a new quick/digital/small commercial printing salesperson must learn about the *printing* side of the equation. Specifically, I want to suggest a two-week training program for bringing a new salesperson up to speed on your company and our industry. It's a pretty common occurrence for a printshop owner to keep a new sales employee in the shop for a couple of weeks—or longer—but my experience is that very little real training goes on during that time. We need to change that situation in order to improve the success rate with outside sales!

Day 1

The first order of business on Day 1 is orientation, and the process of orientation is a vital part of successful training. In fact, you might best think of orientation as a pre-training activity. It's the process of introducing a new employee to company and co-workers and making them feel comfortable in new surroundings. (I wrote an article on new employee orientation 8-9 years ago for one of *QP's* sister publications. If you're interested, send me an e-mail at dmf@fellman-nc.com and I'll send you a copy.)

The next order of business is to start building your new salesperson's understanding of the printing process. At some point during this first day, make it a point to show your salesperson the "traditional quick printing" progression from camera-ready artwork through the daylight camera to printing plates. If at all possible, find a job in your files that required film and metal plates, and explain the positive-to-negative-to-positive process that represents the absolute foundation of printing technology.

Another part of today's lesson is to explain the difference between "spot" color and process color, and how separate plates are required for every color. I've had a lot of success by explaining that what a printing press really does is put color on paper. Sometimes the color is black, and sometimes it's one or more other colors. Sometimes the color is text, sometimes it's graphics, and sometimes it's both. The printing plate carries the image to the printing press, and basically tells the press where to put the color (ink) that we've loaded into the press. As part of this lesson, give your salesperson a PMS book which will become part of his/her permanent equipment. In addition, give your salesperson a copy of Pocket Pal, and the overnight assignment to read the sections on the history of printing, types of printing processes, graphic arts photography, platemaking, printing presses and printing inks.

If you don't have a current copy of Pocket Pal, which is now in its 18th edition, you can get one from a number of sources, including the Graphic Arts Information Network website at www.gain.org. Their current non-member price is \$20. You might also talk to your xpedx salesperson, and ask if he/she can get you a copy. Pocket Pal is published by xpedx's parent company, International Paper. While you're at it, tell your main paper salesperson that you're going to want some of his/her time to help you provide training to your new salesperson. More on that follows.

The third part of the process for Day 1 is to "attach" your new salesperson to the customer service function in your printshop. Ideally, that will mean that your salesperson will work alongside an experienced front counter sales/CSR-type, observing initially, but soon taking an active part in "inside" sales/customer service activities. This is where the entire two-week training process will be centered.

Day 2

The first order of business on Day 2 is a short meeting between you and your salesperson, where you will discuss yesterday's lessons and establish the plan for today. You'll do this every day, and it's a very important part of the inside training program. Your questions every morning should be along the lines of "What did you do yesterday? What did you learn yesterday? What questions do you have from yesterday?" On Day 2, that needs to include what was learned, and what questions remain, from the assigned reading in Pocket Pal.

What if it turns out that your salesperson didn't do the reading? I would say this (first making sure that no one else would overhear the conversation): "I'm tempted to send you home right now, clocked out and not getting paid until you have completed the reading I assigned you, but I think I'll give you the benefit of the doubt this one time and not embarrass you in front of the rest of the staff. But you need to understand something. When I ask you to do something, you do it. Period. Understood?" Say this calmly, but with some force behind your words.

You might remember another article I wrote recently, about not tolerating bad behavior, from customers, suppliers and especially employees. When you see bad behavior, the time to deal with it is immediately! Remember that any bad behavior which is tolerated will likely be repeated!

Hopefully, you won't have to deal with this particular problem. Either way, the main lessons for Day 2 concern pricing and order entry. At some point during the day, go through the pricing process on as many quotes or jobs as possible with your salesperson, explaining all of the factors that go into pricing and how prices are calculated in terms of both cost factors and pricing strategy. The next step is to show your salesperson what it takes to enter an order into your system.

Please note that your salesperson will spend most of Day 2 "attached" to the same front counter sales/CSR-type as yesterday, but I strongly recommend that you take over for these specific lessons. In that way, you'll be sure of at least some of what you're salesperson is hearing and seeing, and anything he/she hears from the rest of your staff that contradicts what you've taught is likely to surface in the form of questions at the next day's morning meeting. In fact, let's not leave that to chance. Make it clear to your salesperson that you expect those questions, and this process might help you to uncover other operational problems that you didn't even know you had!

Day 3

The first order of business—again!—on Day 3 is your short morning meeting, and this one is especially critical if you had issues with the assigned reading the previous day. If that's the case, you need to be satisfied that your salesperson got the message. If not, I suggest that you fire him/her immediately.

That may sound harsh, but let's be realistic here. When you intercept a problem early, it will either get better or it will get worse. If it gets worse after a warning, it's going to keep on getting worse until you have to fire the person eventually. What kind of sense does it make to put yourself through any more aggravation with something that's going to end badly anyway?

The main lessons for Day 3 (assuming that your salesperson made it past the morning meeting) are a continuation of Day 2—pricing and order entry. The difference is that by the end of Day 3, you want your salesperson to be pricing and entering "routine" quotes and orders on his/her own. This work should be supervised, of course, and every quote or order checked for accuracy. Remember, the mistakes made at this stage of the game are training opportunities.

Now, this raises an issue of long-term sales management strategy. The question is, do you want your salesperson to be quoting his/her own jobs, and entering his/her own orders? I can't answer that for you, because there are pluses and minuses to both the "yes" and the "no" strategy. My personal preference would be "no" because I want salespeople doing a minimum of administrative work and a maximum of relationship building. But either way, it's important that a salesperson know how to perform these tasks. For one thing, it will give him/her an appreciation of what it takes to accomplish those tasks, but more importantly, I think, teaching these tasks provides a "window" into your operations that will help a salesperson to learn more about the entire printing process.

We'll add another wrinkle to the training process on Day 3. From this point on, your salesperson will follow every job he/she enters all the way through the production process, which means checking in/sitting in with your designer/typesetter while the job is going through that part of the production process, and doing the same with every other part of the process.

Let's note, though, that there's a difference between checking in and sitting in. At each morning meeting throughout the rest of the two-week inside training period, have your salesperson show you the jobs he/she is tracking, and evaluate what can be learned from each job. On the earliest projects, it might be worthwhile to watch the plates made and mounted and the press actually running the job. After seeing that done once or maybe twice, though, there's not a lot more real educational value in simply watching people do their jobs. It will still be helpful to track how long things take, though, and to learn what sort of jobs are most likely to cause what sort of problems, and that can be accomplished by "checking in" on the jobs being tracked at various times during the day.

Day 3 should also include another "homework" assignment—to read the sections on type and prepress in Pocket Pal.

Day 4

By Day 4, your salesperson should have some comfort with the pricing and order entry process, and we have established the practice of following certain jobs all the way through production. Since prepress is the first stage of production process for most jobs, this is where we'll place most of the emphasis for the next couple of days. Remember in your morning meeting to solicit questions on what your salesperson learned from his/her reading in Pocket Pal.

At some point during the day, make it a point to "visit" your prepress department with your salesperson. There are a number of things you want to make sure to talk about during this session, including what software products you support—and any that you don't want to support!—the level of design capability you offer, and the procedures that

surround this part of the production process. For example, you want certain information to accompany any disk or file provided by a customer. Today is the day you teach your salesperson what he/she needs to do in order to maximize customer service and minimize workflow problems.

It's also the day on which you start teaching your salesperson the basics and beyond of digital printing, concerning both digital equipment and capabilities you have, and equipment and capabilities that you don't have, but that he/she will be running into in the marketplace. You must also teach your salesperson how to train his/her customers on how to prepare digital files for successful printing. I highly recommend John Giles' excellent products "Digital Dialog" and "The Digital Original" as key training resources. (If you don't have them already, you can order them at www.johngiles.com.)

Day 5

As noted, Day 5 will continue the emphasis on prepress and digital issues. Don't forget about the process of following certain jobs through the entire production process, though, and identifying the lessons that can be learned from each job. You talk about those lessons in your morning meeting—"Be sure to look out for this when that job is on press"—and make sure to follow up at the next day's morning meeting to make sure that the lessons were learned.

Your salesperson will be spending part of the day in the prepress department, and part of the day tracking jobs through production. Those activities should account for approximately half of the day. The other half should be spent in the front counter/customer service area, continuing to gain comfort and proficiency in pricing and order entry, and also gaining comfort and experience talking to customers who come in or call in.

Day 5 should also include another homework assignment—to read the sections on postpress and paper in Pocket Pal.

Day 6

By Day 6, your salesperson should be comfortable with the established routine, and able to function without minute-to-minute supervision in the front counter/customer service area. That activity will continue throughout the rest of the second week, as will the process of following certain jobs through the production process. Up until now, those jobs have been relatively simple projects that the salesperson was able to quote and write up. Now, let's look for lessons-to-be-learned from more complex jobs, and start exposing the salesperson to pricing and entering those projects.

Let's also start bringing in some "outside" resources to augment your internal training. On Day 6, I recommend bringing in your main paper salesperson to provide an hour or two of "Paper 101" training. (Note: You obviously need to set this up in advance. I would call my paper salesperson immediately after my new printing salesperson accepted the job and the starting date was determined.)

Day 7

On Day 7, the focus changes from learning about printing in general to learning your company's "strike zone"—in other words, exactly what kind of projects the salesperson should be seeking out and quoting on. You start covering this in your morning meeting, and I would start by asking the salesperson: "What can you tell me about our 'product line'—what people seem to be buying from us—in terms of finished size? In terms of run length? In terms of color complexity? In terms of anything else you've noticed?" It's time to see how much your salesperson has learned by observation, and to fill in the blanks in understanding that are sure to be there!

Day 7 is also the day to focus on postpress issues. Your morning meeting conversation will tell you something about how well your salesperson understands your internal bindery and finishing capabilities. Beyond that, you need to make sure that he/she also understands the sort of bindery and finishing applications that are typically outsourced by companies like yours. The best way to teach those capabilities, I think, is to arrange a tour of a trade bindery—a place where your salesperson can see and learn some of what he/she needs to know about embossing and die-cutting, foil stamping and laminating, and folding that goes beyond your internal capabilities. (Again, this and the other "field trips" I'm going to suggest will need to be arranged in advance, and the earlier you make those calls, the better chance you have of working them in without having to alter my schedule. If that has to happen, though, it's not really that big a deal. Making the training complete and comprehensive is more important than following a schedule to the letter.)

Days 8-9

Days 8-9 continue the established program—morning meetings, with most of the day spent "attached" to the front counter/customer service function, and continuing to track specific projects through the shop. In addition, I

recommend 2-3 more “field trips” to expand on what can be seen and learned inside your shop. I would definitely make one of these a tour of a “big-press” commercial printing company, and the other(s) might include a business card wholesaler, a forms manufacturer, a large-format graphics/signage shop, and possibly a shop with digital capabilities beyond your own.

The main purpose of the trip to the big-press shop is to make sure that your salesperson completely understands your strike zone, especially the implications on having “the right tool for the job” as they apply to competitive pricing. He/she must really understand why a bigger press provides a pricing advantage on bigger jobs. One of the most common problems with new salespeople is that they get all excited about the chance to quote projects that they have very little chance of winning. As I wrote a couple of months ago, your salesperson always starts out at a disadvantage when he/she is the “new guy” in a quoting situation. We don’t want to make that situation any worse by quoting on a project that’s likely to make your price look bad, especially considering the potential to gain “trust and confidence points” by staying within your strike zone.

An additional benefit of these “field trips” is some quality talking time between you and your salesperson, uninterrupted by the myriad of things that demand your attention whenever you’re in the shop. You should think of this time as an opportunity to expand on your morning meeting: “What have you been doing during the time you’re not with me? What are you learning? What questions do you have?”

Day 10

Day 10 is Evaluation Day. I recommend that you clear your schedule for most of the day, and plan to spend it with your salesperson, observing him/her in the inside sales/customer service role, watching him/her estimate prices and enter orders, and walking along through the process of tracking jobs through the shop. Ask lots of questions to make sure that your salesperson understands both the tasks and the underlying principles or procedures. And when it’s apparent that a lesson has not been fully learned, keep talking about that lesson until it is! By the end of this day, you need to feel confident that your salesperson has a pretty good grasp of the necessary product and operational knowledge, or else you need to question the wisdom of continuing his/her employment. At the very least, you’d need to recognize that more training is required, and that training may be beyond your current internal capabilities.

That’s not to say that training is over after two weeks, by the way. Remember, all we’ve really got here is a two-week program to teach your new salesperson the basics of the *printing* side of the printing sales equation. It will take quite a bit longer to truly become a printing expert, but that’s OK—as long as we develop a solid foundation which will allow your salesperson to get out and talk intelligently with prospects and customers while he/she builds up to the “expert” level.

Day 10 should also include another homework assignment—for your salesperson to think about what he/she is going to do on Day 11, when the inside training period is over and it’s time to get out into the marketplace to try to make something happen.

You should both plan to talk more about that at your morning meeting on Day 11!