

## CASE STUDY

# MICRO-FIRST TRAINING INITIATIVE YIELDS 8.5% SPIKE IN NEW OPPORTUNITIES

for KAESER COMPRESSORS



**MATT MCCORKLE**

*Manager of Branch Operations*

**KAESER**  
COMPRESSORS



## IN A NUTSHELL

Matt McCorkle, Manager of Branch Operations at Kaeser Compressors in Fredericksburg, VA, designed a 12-month training initiative based on RLI's "Micro-First" model for deploying research-based micro-videos. He rolled it out to 100 sales professionals, including 60 territory field salespeople, 20 sales managers and 20 inside sales reps. As a result of Kaeser's methodical execution of the Micro-First initiative, new opportunities shot up 8.5% in just five months, which, Matt says, "we attribute totally to the training initiative."

“ I wanted to bring in more new business by creating a sustained learning culture in my sales department.

### MATT'S CHALLENGE

#### New sales opportunities were stagnant

When Matt took over sales training in 2015, Kaeser had lots of product training but **no selling-skills training**. He hired a sales training consultant who conducted 2- to 3-day instructor-led training (ILT) events. “We used him for about three years,” says Matt. “His events were awesome. He refined our messaging and taught us a sales process. But we never knew who retained what from the ILT. The learning didn't stick, so prospecting behaviors continued to be ineffective.”

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### THE SOLUTION

#### Short, research-driven coaching tools and a programmatic approach to make learning stick.

Matt decided to try online sales training and initially chose a firm that offered long modules. “**Nobody watched them,**” he says. “I needed a more methodical way to train people on an ongoing basis and support the sales managers with coaching materials,” he said. “I wanted to see more shared vocabulary and unity throughout the company.”

## THE SOLUTION *(CONTINUED)*

**Then Matt discovered RLI.** He'd attended a Webinar and watched a few 5-minute RLI videos. "I loved that they were **short and simple**," said

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Matt. "What I really liked was that RLI uses the same terminology, the same sales philosophy and the same process that we were using internally. There were so many elements that connected what we were already doing."

Matt began with a needs analysis using RLI's proprietary **Behavior Change Assessment Tool (RLI-BCAT™)**. It showed that the most acute skill gaps were in prospecting, so Matt worked with RLI Client Success Manager Jackie Dickisson to map RLI content to these gaps. He then designed a 12-month learning initiative based on RLI's "Micro-First" model.

Unlike traditional training, which often uses micro-training for reinforcement after a long-form training event, the "Micro-First" approach puts micro-training up front. A 5- to 7-minute video focused on a single concept is the trigger for a learning process that includes follow-up activities such as coaching, discussion, role-play and performance feedback. **The follow-up isn't an afterthought** – it's THE thought.

Matt followed the RLI Micro-First methodology. He and Jackie chose 12 prospecting-related videos. Then Matt planned out 12 one-month learning cycles, each triggered by a single video. "The idea was that our four territory managers (in separate locations) would all watch the same module and discuss it in the weekly sales meetings for three or four weeks. I figured they were having the meetings anyway, **so why not have a strategy for the meetings?** Instead of just asking, 'What did you do since the last meeting?' we ask, 'What's your strategy going forward when it comes to call reluctance, or some other issue in one of the videos?' Instead of doing the meetings ad hoc, we now have a plan."

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## RESULT

**“A culture of persistent prospecting” boosted new opportunities by 8.5% in just five months.**

“It’s working because there’s been a shift in mindset about training at Kaeser,” said Matt. “Today we’re following a structured plan. **People know why we’re doing it.** Everybody is using the content, including our high performers, and they’re sharing success stories with each other. The videos are desirable to them because they’re all interested in the results they’re going to get.”

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## BIGGEST BENEFITS FOR KAESER

### The research-based approach.

“RLI’s research-driven content is big,” said Matt. “Sales is constantly changing and with RLI pulling research from Harvard and other places, it makes us feel we’re current and that we’re using **proven techniques.**”

### The time savings.

“The RLI approach is a **big time-saver.** You do some planning up front designing the learning initiative, but the execution is very manageable. On a monthly basis, I spend only a couple extra hours. For me, the RLI approach is a time multiplier.” ■

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