

## EFFECT OF REFRESHER AND SKILL TRANSFER INITIATIVES (RSTI) TO BHP REPRESENTATIVES' SALES STATS PERFORMANCE

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### ABSTRACT

This study investigates the impact of Refresher and Skill Transfer Initiatives (RSTI) on the sales performance of Bank of Montreal Home Advantage Plus (BHP) sales representatives. The research aimed to determine whether RSTI contributes to enhancing the sales performance of BHP representatives. Employing a mixed-methods approach, the study selected 17 employees through purposive sampling and collected data using various instruments including Participant Observation, Sales Reports, Focus Group Discussions, and Feedback Forms. Both quantitative data, analyzed through descriptive statistics, and qualitative data, examined thematically, informed the analysis. The study utilized Jamovi Analysis to derive average mean scores and interpret the statistical significance of RSTI's impact post-implementation. The findings highlight the positive effect of RSTI on BHP sales representatives, noting significant improvements in sales and behavioral performance. Feedback from participants further endorsed RSTI, advocating for its continued use. This research enriches Sales Training literature by introducing behavioral performance enhancements, such as compliance, selling, and soft skills, as critical outcomes of RSTI. The results affirm that RSTI significantly bolsters sales personnel' sales performance and skill sets.

*Keywords: Refresher and Skill Transfer Initiatives, sales training, skill transfer, soft skills, behavioral performance*

### INTRODUCTION

Numerous nations have recognized the significance of training programs aimed at enhancing the sales performance of their workforce, particularly those engaged in outbound campaigns or direct selling environments. In the fiercely competitive landscape of today's market, organizations are continually seeking innovative strategies to bolster their sales, develop their personnel, and refine their programs. A proficiently trained sales team can compete with and surpass its rivals. The investment in training is deemed worthwhile, as articulated by Jagodic et al. (2012), for it enhances employees' skills and yields substantial returns.

Training is deemed essential for keeping employees abreast of the escalating market competition, equipping them with the confidence and edge needed to excel in sales. Staff training programs are pivotal for professional growth, enabling employees to demonstrate their skills and talents. Recognizing employees as the organization's most valuable assets underscores the importance of offering training for their professional development, which, as Novita & Soesanto (2017) suggest, can significantly improve sales performance.

Training equips employees with the necessary skills and knowledge to meet the organization's goals and overcome challenges, as per Tullar (2015). Furthermore, investing in

employee training enhances their skills and fortifies the managerial role, emphasizing the symbiotic relationship between employees and managers in the training context.

In the case of the current company's program, SIGMA, which supports various banks in Canada by offering services to protect customer information and provide assistance, the importance of managerial support in two accounts, BHP Bank of Montreal Home Advantage Plus and WMT Walmart Bank is evident. Despite BHP's exceptional performance, a shortfall in meeting the Bank Clients' objectives was observed. A Needs Analysis was conducted to delve into the root causes of this performance issue, incorporating performance data, QA findings, literature review, and Focus Group Discussions.

This analysis identified Compliance Skills (Product Knowledge), Soft Skills (Customer Connection), and Selling Skills (Call Handling Strategies) as areas of concern. Focusing on these aspects through introducing the RSTI training aimed to address these deficiencies and contribute to the literature on training's impact on sales performance.

### OBJECTIVE OF THE STUDY

This study sought to evaluate the effectiveness of training on the performance of BHP sales representatives, focusing on three primary research questions. The first is to understand the impact of the Refresher and Skill Transfer Initiative (RSTI) on the performance of BHP representatives in terms of Compliance Skills, Soft Skills, and Selling Skills, both before and after its implementation. The second is to analyze the specific impact of RSTI on sales performance. Lastly, the study intended to gather and present feedback from the BHP representatives regarding their experiences and outcomes following the implementation of the RSTI.

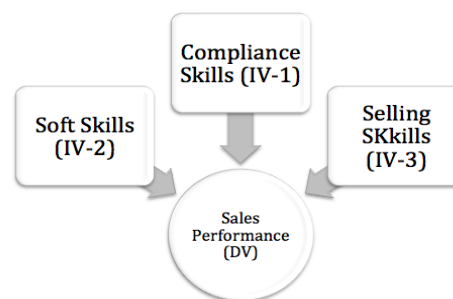


Figure 1: Conceptual Framework

### METHODOLOGY

The Action Research conducted in this study utilized the Plan-Do-Study-Act (PDSA) Model, as outlined by Deming in 1993. This research method is designed to concurrently address and solve specific issues or problems, embodying the dual process of researching and implementing actions. Action Research is particularly favored in fields where practitioners, such as educators and professionals, seek to critically examine and enhance their practices through iterative cycles of planning, executing, observing, and reflecting. This approach is highly regarded among teachers, who view it as an effective means to refine their teaching methodologies based on the principles of continuous improvement and evidence-based practice (Prudente & Aguja, 2018).

Furthermore, this research adopted a mixed-methods approach to assess the effectiveness of Refresher and Skill Transfer Initiatives (RSTI) on the sales performance of Walmart employees. The mixed-methods strategy integrates both qualitative and quantitative data—gathering open-ended responses for the former and employing questionnaires or scales for the latter—to comprehensively analyze the study's findings (Creswell, 2014). This approach enables a more nuanced understanding of RSTI's impact, combining numerical data with contextual insights to evaluate outcomes.

The research participants were the 17 BHP sales representatives (Mage – 37.3, SDage – 8.27 years, 52.9% female) under my Team. The study



included them because they are the affected representatives with low sales performance. And they were chosen because they are the first source of sales performance. Furthermore, due to the latest situation in the country and the improvement in COVID-19, everything will be done onsite using different platforms needed to support the training.

In preparation for RSTI, the Researcher got the participants' permission to make sure they were aware of the training. Their consent is important to ensure they are aware of and have acknowledged some issues that must be addressed. Needs analysis has been made to gather evidence of the problems or the issues of the study including the data from the Operations and Quality department, literature review, and focus group discussion. Needs Analysis defines the deficiencies or problems and identifies causes and solutions. It can be thought of as identifying gaps between what should be happening and what is happening and accounting for the causes of these gaps. I created an RSTI Module that we used for the Training Then; the module was revisited accordingly and was validated by three professionals in this field. Training runs for 8 weeks and includes the discussion addressing the three main issues or root causes of the issue and pre-test and post-test will be utilized. Figure 6 shows the coverage and agendas of RSTI each week.

During implementation, data gathering was administered in each section: Compliance, Soft, and Selling Skills. The training properly started with discussing the first skill – Compliance skills. The discussion focuses on the importance of following the standard script guidelines and the correct process for verifying information. Then soft skills focus on enthusiasm, improving confidence and professionalism while Selling Skills focus on knowing the issue and understanding how to address those objections properly. Sales Performance was monitored before and after the implementation.

After the implementation of the training, consolidation, and evaluation of the before and after results were checked and facilitated to understand the effect of RSTI on the BHP Representatives' sales and behavioral

performance. Data analysis and interpretation were implemented to see the result and impact of the training and to also check the level of improvement. Focus Group Discussion was facilitated post-training to top-performing representatives and Outliers to see the initiative's effect from both perspectives. After that, we finalized the result and shared the ideas of the action provided in the research to the readers to help them in their future studies.

The RSTI Module discusses the three main issues identified during the Needs Analysis: 1) Compliance Skills Issue – product knowledge 2) Soft Skills Issue – call connection and 3) Selling Skills Issue – call handling strategies.

*Statistical Treatment of Data.* Compliance Skills, Soft Skills, and Selling Skills were assessed using an Observation Checklist/Self-Assessment Form with a 5-Likert Scale, modified by the researcher for the sales context. The scale ranged from 5 (excellent) to 1 (poor). For Compliance Skills, the measured items included: (1) the representative's demonstration of readiness, (2) usage of necessary verbiage during sales presentations, (3) adherence to established and revised script guidelines, and (4) compliance with script disclosure and verification requirements. Soft Skills were evaluated based on: (1) the representative's display of enthusiasm, confidence, and professionalism, (2) engagement with the customer, (3) acknowledgment of the customer's concerns, and (4) strategic active listening. Selling Skills assessment focused on: (1) how the representative addressed customer objections and concerns, (2) adherence to rebuttal limits, and (3) effective delivery of rebuttals.

Sales Performance was also measured using the Observation Checklist/Self-Assessment Form and the 5-Likert Scale, alongside sales data collected via the Sales Pivot Report provided by the Production Team. This allowed for manual data tracking and aggregation using Pivot Reports, with the Insight Application serving as a backup for data retrieval. The sole metric for sales was the conversion rate, targeted at a 100% pro-rate percentage.

To gauge the effectiveness of RSTI post-intervention and the BHP representatives'



perceptions, the researchers utilized Feedback Forms and Focus Group Discussions (FGD). The Feedback Form, employing the 5-Likert Scale, sought respondents' opinions on engagement levels, understanding of skills, the effectiveness of RSTI in compliance and skill enhancement, overall satisfaction, and recommendations for RSTI and trainers. Questions covered interest maintenance, skill comprehension, application ideas from RSTI, satisfaction rates, and additional training needs.

Lastly, the FGD aimed to identify the training's highlights and areas for improvement. Participants included three top performers and three outliers from the training, fostering an interactive discussion environment. The FGD questions explored performance assessments pre- and post-RSTI, opinions on the training's focus areas, strengths and weaknesses observed during RSTI implementation, skill improvement perceptions, future training willingness, and additional comments and suggestions.

## RESULT AND DISCUSSION

### 1. Effect of RSTI before and after the implementation of RSTI in Behavioral Performance

In identifying the effect of RSTI Training before and after the intervention, an 11-item for Behavioral Performance Criteria (BPC) was administered to n=17 respondents. The BPC Checklist consists of 11 items pertaining to the behavioral issues being identified during the Needs Analysis namely: (1) Compliance Skills – which focuses on product knowledge issues, (2) Soft Skills – which focus on customer connection issues and (3) Selling Skills – which focuses on call handling strategies issues.

Table 1 shows the level of impact of the RSTI before and after implementation. From the n=17 respondents, an overall mean score of 4.79 was recorded for compliance skills. Whereas, for the soft skills, it ended with a 3.76 mean score; for the selling skills, the researcher gained an overall mean score of 3.57.

**Table 1**

*Before and After Result of RSTI in Behavioral Performance*

Behavioral Performance	N	Mean (Pre-Test)	Mean (Post Test)	SD (Pre-Test)	SD (Post Test)
Compliance Skills	17	2.88	4.79	0.281	0.254
Soft Skills	17	3.00	3.76	0.661	0.615
Selling Skills	17	2.92	3.57	0.572	0.599
Overall	17	2.93	3.97	0.375	0.328

The overall mean score proposed that RSTI holds a positive impact and a better result after the implementation of the training, especially in improving the Compliance Skills of the BHP Representatives and the Soft Skills. On the other hand, BHP representatives were identified to have the lowest improvement in selling skills. This is proven in the study of Shrivastava, Mathur, and Rafeeq (2023) that training in soft skills had a significant and positive influence on the soft skill development of sales employees. Their findings suggested that investing in soft skills training programs can benefit sales employees, which in return can contribute to their professional success and the overall performance of the organizations they work for. In this regard, Mardatillah (2018) also stated that soft skills are very important in the business. Unprofessional salespersons' behavior and responsibility can ruin the image of the business and lead to decreased revenue due to a lack of public interest. That is why, they developed a training program to improve the competence of salespersons in making sales and the result of their research in developing soft skill training shows an increase in the total sales. Nicod, Llosa and Bowen (2020) also mentioned in their study that developing training that teaches the employees to be compliant in scripting is an opportunity to increase the amount of sales per customer without decreasing customer satisfaction. When scripting proficiency increases, customers spend more money, when it decreases they spend less money. If the customers are considered to be partial employees, they are also the beneficiaries of the store experience. Organizations should question their desired script and include a customer perspective in its design. Script realignment should increase the value for both customers and retailers.



**Table 2**  
*Pre Test and Post Test Result and Statistical Result of RSTI in Behavioral Performance*

Behavioral Performance (Pre-Test / Post-Test)	t	p	Decision
Compliance Skills	-24.8	< .001	Reject Ho
Soft Skills	-7.21	< .001	Reject Ho
Selling Skills	-4.79	< .001	Reject Ho

Pre-Test and Post-Test of Behavioral Performance were show in Table 2 below. The result showed that there is a significant difference with Compliance, Selling and Soft Skills before and after the implementation of the RSTI. The statistics result of Compliance (-7.21), Selling (-4.79) and Soft (-24.8) showed that the BHP representatives showed great improvement in these areas after they underwent training of RSTI.

## 2. Effect of RSTI before and after the implementation of RSTI in Sales Performance

**Table 3**  
*Before and After Result of RSTI in Behavioral Performance*

Sales Performance	N	Mean (Pre-Test)	Mean (Post Test)	SD (Pre-Test)	SD (Post Test)
Sales	17	2.00	3.53	0.935	1.420
Overall	17	2.00	3.53	0.935	1.420

In identifying the effect of RSTI Training before and after the intervention, a 1-item for Sales Performance Criteria (SPC) was administered to n=17 respondents. The SPC Checklist consists of 1 item pertaining to the sales performance of the respondents. Table 3 shows the level of impact of the RSTI before and after implementation. From the n=17 respondents, an overall mean score of 3.53 for the sales section. The overall mean score proposed that RSTI and any skill improvements improve sales performance later. This is proven in Rastogi's (2014) study that proper sales training for sales personnel increases their competence and can assist companies in building a more productive sales force. In his study, sales staff training became the leader for sales growth as it showed an increase in sales after the training was conducted. The sales of the service companies depend on the skills of the sales personnel. So, the higher the sales training in service companies, the higher the company's growth will be. The study of

Novita and Soesanto (2017) demonstrates the same result on how training improves sales wherein the overall variables in training being conducted in their study have a significant positive result in sales after the intervention. One of the results of their study indicates that the training quality influenced salesman performance and the test results can be concluded that it has a positive effect on the salesman and their sales result.

**Table 4**  
*Pre-Test and Post-Test Result and Statistical Result of RSTI in Sales Performance*

Sales Performance (Pre-Test / Post-Test)	t	p	Decision
Sales	-5.35	< .001	Reject Ho

Pre-Test and Post-Test of Sales Performance can be found in Table 4. The result showed that there is a significant difference with the sales performance before and after the implementation of the RSTI. The statistics result of Sales (-5.35) showed that the BHP representatives showed great improvement in this area after they underwent training of RSTI.

## 3. Perceptions of the BHP Representatives in RSTI after the intervention

In identifying the effect of RSTI Training on BHP representatives and their perception of the training, a 5-item questionnaire was administered to n=17 respondents. The Feedback Form consists of five questions about the training's helpfulness. Table 6 displays the level of impact RSTI had on the BHP Representatives post-training. From the n=17 respondents, an overall mean score of 4.94 was recorded for the question, "Did you have a better understanding of product knowledge, selling, and soft skills?" Meanwhile, the three other questions, such as "Was your interest held?", "Did RSTI give you better ideas about the three factors?" and "Would you recommend the initiatives?", ended with a mean score of 3.88. Lastly, for the rating of the training, the researcher obtained an overall mean score of 4.52.



**Table 5**  
*Feedback Result of BHP Representatives towards RSTI*

RSTI Feedback Questions	N	Mean Score	Remarks
Was your interest held?	17	4.88	Outstanding
Did you have a better understanding of Adherence, Soft and Selling Skills after the Training?	17	4.94	Outstanding
Did RSTI give you better ideas on how to follow Adherence, Improve selling techniques and interaction to the customers?	17	4.88	Outstanding
How will you rate the RSTI Training?	17	4.52	Outstanding
Would you recommend RSTI Training to others?	17	4.88	Outstanding
<b>Overall</b>	<b>17</b>	<b>4.82</b>	<b>Outstanding</b>

The overall mean score suggests that RSTI had a positive impact and yielded better results post-training, with an overall mean score of 4.82, especially in providing a deep understanding to the respondents about the training, which is the main reason for conducting the training. This is supported by the study of Santoso, Basirun Azhar, and Husain (2020), which stated that after the training was held, there was an increase in understanding of the use of products as a means to increase sales results. Their findings indicate that the training runs effectively, evidenced by a significant percentage of participants, 60.62%, becoming ready to sell their products post-training, concluding that there is a significant influence between pre-training and post-training on participants' readiness to utilize product features to boost sales in their area. In this context, Tullar (2015) also noted in his study that training significantly impacted sales, but the point to emphasize is that those who attended the training knew improvement was expected. Perhaps the training motivated them to exert extra effort, or it addressed gaps in their knowledge.

Feedback on the implementation of RSTI, found in Table 5, shows that BHP representatives' interest in the intervention concluded with a rating of 4.88 (excellent). The representatives also gained a better understanding of the intervention and whether it provided them with clear ideas on how to implement these on their calls, both ending with ratings of 4.94 and 4.88 (excellent), respectively. RSTI received a rating of 4.52 (excellent) and a recommendation rating of 4.88 from the representatives.

**CONCLUSION**

The study delved into the impact of the Refresher and Skill Transfer Initiative (RSTI) on

the performance metrics of BHP sales representatives, yielding significant insights. Firstly, the intervention led to noticeable improvements in the behavioral aspects of performance, specifically in areas such as Compliance Skills, Soft Skills, and Selling Skills. This progress was marked by the team's ability to rectify previously identified shortcomings in their call-handling behaviors. Secondly, a marked enhancement in sales performance was observed post-intervention, with data indicating that the implementation of RSTI not only improved sales efficacy but also enabled a majority of the representatives to meet or exceed the 100% performance goal. Thirdly, feedback from BHP representatives on the RSTI training was overwhelmingly positive. They highlighted the critical role of such training programs in bolstering the skill set of sales personnel, leading to enhanced performance. The consensus among the representatives was that training is vital for significant behavioral improvement, equipping them with the knowledge and strategies needed for better call judgment and more effective customer objection handling, thereby increasing customer interest in the service. This study affirms the importance of continuous sales training and skill development, emphasizing that being a lifelong learner provides a competitive advantage in the sales field.

**RECOMMENDATION**

The researcher recommends emphasizing the critical role of targeted training and skill development in addressing performance issues and enhancing sales outcomes. The recommendation is that companies should prioritize such initiatives, as training has been shown to significantly boost performance and sales capabilities, offering new perspectives and essential skills. This was exemplified by the positive impact on BHP Representatives. Training is highlighted as a crucial platform for enhancing skills, especially when employee performance declines. It can address knowledge gaps, particularly in product presentation and sales strategies, thereby improving call behavior and

success in deal closures. Effective communication, including empathy, rapport, and professionalism, is essential in this business, which relies heavily on voice interaction. Addressing performance issues constructively, rather than attributing blame, fosters a supportive work environment, boosts morale, and builds confidence. Feedback from BHP Representatives on the RSTI Training underscores its value, noting improved service understanding, enhanced empathy in communication, and increased confidence in-service presentation. This not only improves skills but also reinforces the employees' sense of value within the organization. Finally, the researcher advocates for the continuation of RSTI Training for future cohorts and suggests applying similar initiatives across other business units facing comparable challenges, highlighting the universal benefits of targeted training programs in improving performance and sales outcomes.

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