

# The Sales Learning System

with the 5 Stages of Sales Mastery & Behavior Change

How to Get Adoption and Deliver Outcomes with  
your Sales Performance Improvement Initiatives



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*Transforming*  
**SALES RESULTS™**

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## Introduction

### What is Systems Thinking?

Let's start by defining "system."

Daniel Kim, co-founder of both Pegasus Communications, Inc. and the MIT Center for Organizational Learning, offers the following [definition of system](#):

*"A system is any group of interacting, interrelated, or interdependent parts that form a complex and unified whole that has a specific purpose."*

He continues, *"The key thing to remember is that all the parts are interrelated and interdependent in some way. Without such interdependencies we have just a collection of parts, not a system."*

For my purposes, in organizational effectiveness and sales performance improvement work...

*"Systems thinking is a method of critical thinking where we analyze the relationships between the parts of an organizational system to understand it more fully to make better decisions about how to improve its performance, and therefore, business outcomes."*

The sales performance ecosystem is an example of this. Note that this graphic only considers elements of the sales systems and the alignment with marketing, but not all the systems that surround and support (or hinder) sales performance.



## Why Do We Need a Sales Learning System?

### Training Doesn't Always Improve Performance

The difficulty of achieving a return on investment for sales training is well documented.

According to ATD's last annual [State of Sales Training](#) report, the average annual expenditure for sales training was \$954,070. There is obviously a lot of variance across companies, but that is the average for the companies that responded. In this report, respondents cited a significant number of barriers to effectiveness – the largest being that 50 percent indicated that sales people are not held accountable for applying skills learned in training.

### Sales Effectiveness is Declining

At the same time, various sales research studies continue to report alarming findings about the state of sales force effectiveness too. We often hear research findings such as:

- How little time sales reps spend engaging in client-facing selling activities (reported as ranging from 34 to 41 percent).
- That quota attainment is less than optimal (under 60 percent in all studies and according to [CSO Insights](#), trending downward for the past several years).
- The “No Decision” opportunity status is often near and sometimes greater than losses to competitors.
- Overall, buyers do not view sales reps favorably and executive decision makers are disappointed with initial sales meetings.

All of this is occurring while the number of sales enablement roles/functions and the investments in training and enablement are increasing. That means we have an increase in infrastructure and expenses and a decrease in overall sales effectiveness.

To avoid “lying with statistics,” I want to recognize that the decreases in performance don't necessarily coincide with the organizations who made the investments. That exact correlation has not been made in the studies I've seen. There are a few studies, such as [Highspot's 2017 State of Sales Enablement report](#), which suggest that companies that invest in sales enablement are yielding higher returns than others.

Regardless, training ROI remains elusive to many, and overall industry sales effectiveness is disappointing and decreasing. Before his retirement in 2017, Dave Stein, founder of the highly-respected sales training analyst firm, ES Research, Inc., published that 85-90 percent of sales training did not provide any impact beyond 90 days. In my experience, this situation hasn't changed. Even when programs do produce a return, the return is often not maximized and the initiative doesn't achieve its full potential. We can do better.

## The Future of Selling

The current business landscape isn't making things any easier for sellers, which is certainly one factor that is hampering sales effectiveness:

- B2B selling is becoming even more complex (more decision-makers are involved; there are more difficult challenges to solve)
- We're experiencing a [VUCA](#) business environment (where volatility, uncertainty, complexity, and ambiguity are increasing)
- Leaders are facing more [adaptive problems](#) (problems without known solutions) which cause more fear, uncertainty, and doubt (FUD) in buyers
- Budgets are tightening, requiring corporate leaders to "do more with less"
- The risk of bad decisions is increasing, causing decision paralysis
- Business model disruption is accelerating
- "Big Data" is becoming "Data Overload"
- According to multiple studies, buyers' expectations of sellers are increasing and we're not meeting them
- Product-centered selling and transactional selling are still prevalent, despite evidence that in most enterprise B2B complex sales environments, they do not foster trust with buyers, deliver the most effective solutions, or produce the best sales results
- Artificial Intelligence (AI), Bots, and Machine Learning are forecasted by pundits and sales analysts to replace transactional selling and augment enterprise-level consultative selling
- We're working in a business environment where "nothing is constant except change"



It's time for a new and different approach. "More, faster, harder, longer" is not an effective sales growth strategy. Neither is doing the same thing repeatedly and expecting a different result. Of course, a Sales Learning System is not the only solution to the challenges faced by the sales profession. But without an aligned systems approach, it will eventually become impossible to shift behaviors quickly enough, or become good enough fast enough, to achieve strategies, execute tactical plans, and improve sales productivity (revenue per rep).

***"All failure is failure to adapt, all success is successful adaptation."***

~ Max McKeown, author of "Adaptability: The Art of Winning in an Age of Uncertainty"

## Why Do Sales Training Projects Fail?

Before we discuss the details of the Sales Learning System as a solution, let's take a deeper look at why training typically fails.

*“Given the complexities of today’s dynamic selling environments, it’s easy to see why so many organizations are putting an increased emphasis on sales enablement. Unfortunately, despite the increased investments... many organizations are not seeing the expected returns in sales performance. For example, while sales force enablement as a discipline grew from 19.3 percent in 2013 up to 32.7 percent in 2016, quota attainment decreased from 63 percent in 2012 down to 55.8 percent in 2016.”*

[Source: [2017 CSO Insights Sales Manager Enablement Report](#)]

Over the years, I've seen a pattern emerge of multiple root causes for why sales training fails to produce the intended result (a measurable improvement in sales performance).

- Training is not always the right solution to the performance problem at hand (for clarity, training will only solve a performance problem when people do not know what to do, why to do it, how to do it – or as a qualifier between levels of performance – *how well* to do something, or perhaps in some cases, when and where to do it)
- Training is the right solution, but the selected training content will not produce real-world results
- Training is the right solution and the content is appropriate, but the learning design or experience is very poor
- There is no post-training knowledge sustainment plan to assess and improve knowledge retention rates
- There is no plan beyond the training event(s) to continue skill development or provide practice with feedback loops
- There is no training transfer plan to help employees apply what they learned on the job
- There is little or no coaching support to guide employees to skill mastery over time
- There is no plan to measure the lead and lag indicators for learning or performance (what gets measured gets done)
- Performance Management is absent or weak, so managers don't use the data provided, inspect what they expect, and/or hold sales reps accountable to use what they learned
- The training initiative is treated as an event (or series of events), rather than an ongoing project that is managed using proven change leadership and change management practices, to foster behavior change and cement those changes in the culture

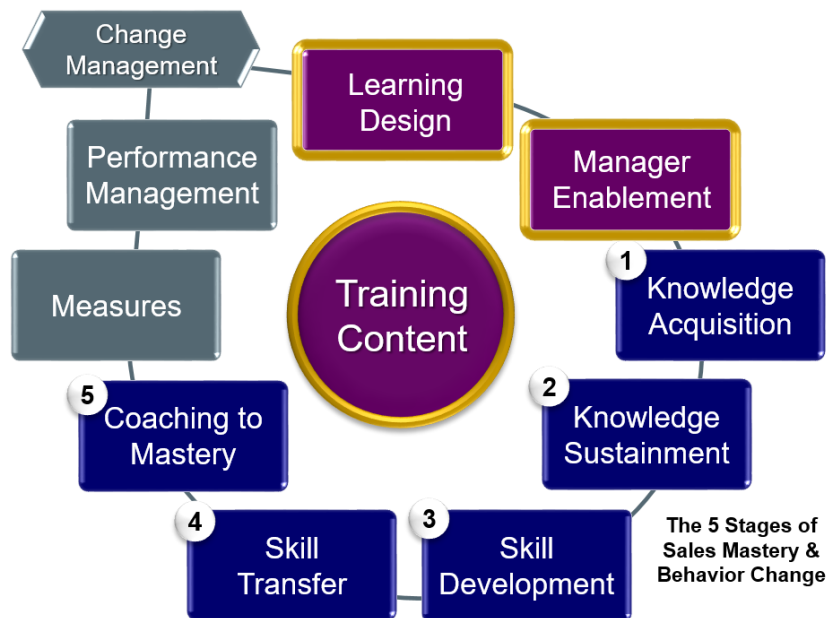
## The Sales Learning System

This system was designed to directly address those root causes. With that in mind, let's review the Sales Learning System in detail. The system operates best as a whole, but we'll review it in three parts:

- Prepare for Change
- Guide the Change
- Cement the Change

### Prepare for Change

**Training Content:** You prepare for change by ensuring that your sales training content will deliver results in the real world, when it is applied as intended. Without this foundation, it doesn't matter how well the rest of your system works. Therefore, Training Content is central to the system. The best ways to ensure content effectiveness are by conducting a top-producer analysis to identify the differentiating practices of your top producers, or using proven-effective best practices that by are customized to your company.



**Learning Design:** Designing a great learning experience is not as easy as most think. We use instructional design experts to help clients develop the right training, delivered in the right way, to maximize the time and expense of sales training and ensure that the skills are learned well and get used. Whether they're internal or external, I strongly recommend engaging learning experts to ensure your training strategy and design are effective (and that training is an effective performance intervention that will address the issues that are holding your sales force back from performing at higher levels).

**Manager Enablement:** I also recommend engaging front line sales managers in all parts of this process. This doesn't mean that managers must do a lot of work – they are already over-burdened and spread thin. They need to be:

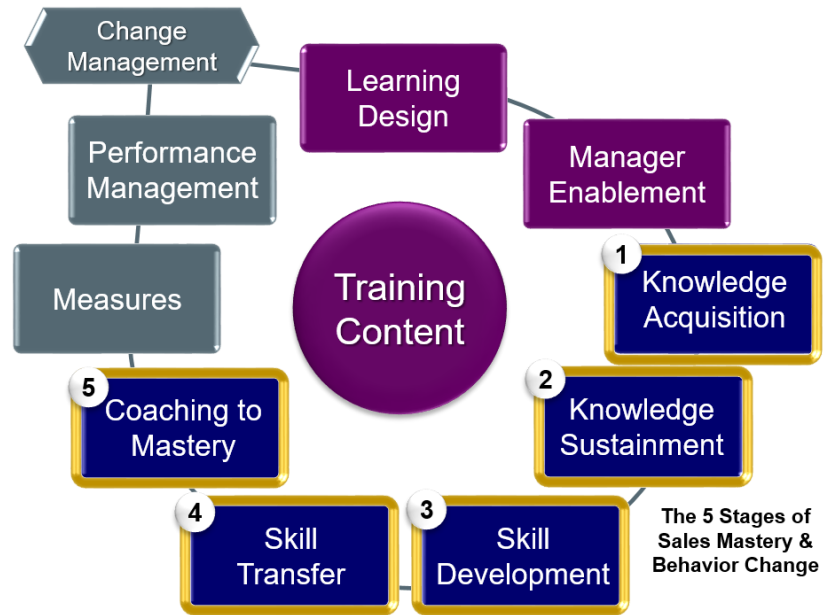
- Engaged in the development or customization of the content, so you have their buy-in
- Trained in the content, to understand it more deeply than their sales reps
- Enabled to analyze whether it's being used as taught and intended
- Prepared to reinforce the content and coach to close gaps in the application

While this is only one aspect of what I consider "Sales Manager Enablement," this is certainly critical to an effective Sales Learning System. It's entirely possible to engage managers this way and wrap the support of your sales methodology into the fabric of their management operating rhythm, to *support* your managers as they support their team, rather than disrupt the managers. This isn't extra work, it's truly part of what they *should* be doing. As mentioned, full Sales Manager Enablement is a deeper topic, but this level of enablement will work for the learning system.

## Guide the Change

**The 5 Stages of Sales Mastery & Behavior Change:** In the next part of this system, managers stay engaged to help sustain the new knowledge, help reps develop and use their new skills with customers, and achieve mastery of these new skills, over time.

You simply can't drive radical performance improvement without the involvement of frontline managers. But, to the previous point about how busy they are, there are ways that the organization can support this process, so it's not all resting on your sales managers.



## The 5 Stages of Sales Mastery & Behavior Change

The 5 Stages of Sales Mastery and Behavior Change are part of the Sales Learning System, but are so important for implementation, that we should take a closer look.

STAGE	Stage 1: Knowledge Acquisition	Stage 2: Knowledge Sustainment	Stage 3: Skill Development	Stage 4: Skill Transfer	Stage 5: Skill Mastery
WHAT	Acquire the knowledge behind the skill with examples and assessments/tests to validate learning.	Sustain the knowledge; reverse the "forgetting curve."	Develop and practice skills. Convert knowledge into behavior.	Apply the newly-acquired and practiced skills in the workplace.	Guide and coach reps to skill mastery and performance outcomes, over time.
HOW	eLearning, Classroom Instruction (FTF or Virtual), Assessments	Q&A, Check-Ins, Assessments, Learning Reinforcement Systems	Flipped Classrooms, Role Playing, Live Simulations, Virtual Coaching Tools	Mentoring and Preparation to Use Skills, Forms/Job Aids/Performance Support	Sales Analytics, Observation, Field Training and Coaching, Coaching Forms and Tools
WHY	<b>Learn something new.</b> Known to work. What, Why, & How.	<b>Don't forget.</b> Just because they learned something new, doesn't mean they'll retain it.	<b>Develop skills.</b> Just because they know and remember, doesn't mean they can do it.	<b>Apply skills.</b> Just because they can do it, doesn't mean they will. (Skill/Will Matrix)	<b>Achieve mastery.</b> Just because they tried it, doesn't mean they did it well or will continue to do it.

This model is so robust, and ties to so many learning approaches and tools, that it could easily be an eBook of its own. Take a moment and review the chart, including what each stage entails, how each can be done, culminating in the "Why," or the premise for each stage. If you are a sales enablement or sales training professional, you will find the stage names and the logic in the Why row to be most helpful when

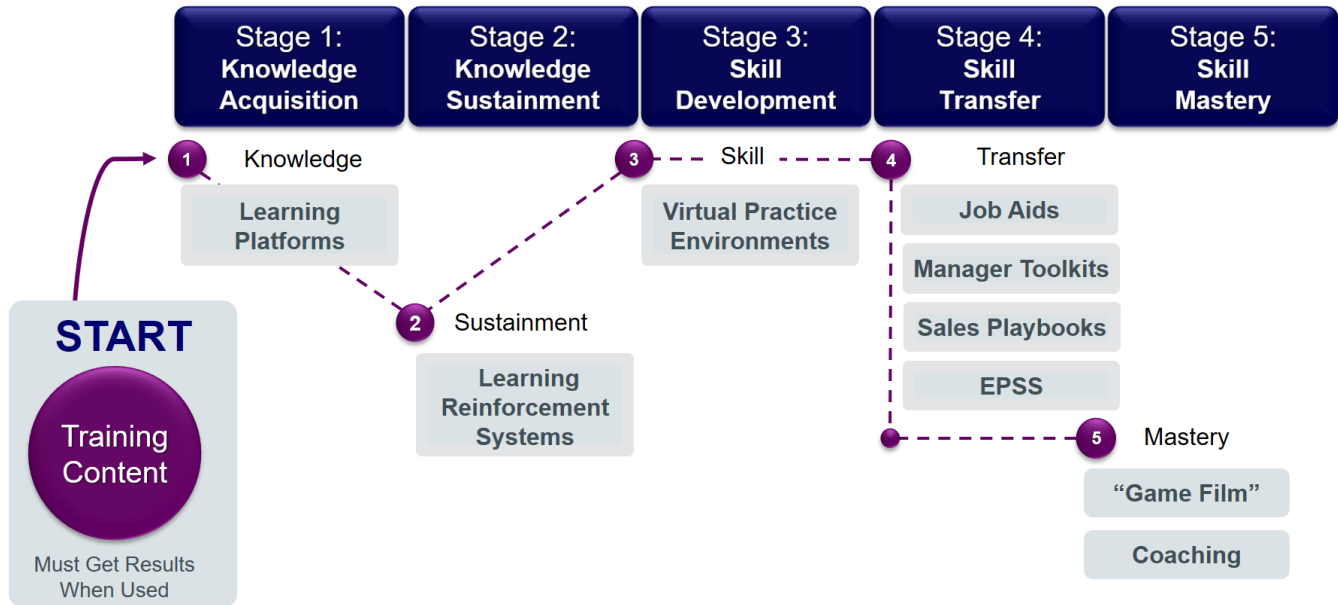


attempting to gain internal support from senior leadership for implementing the stages. You may also need to build a business case, but that is a topic for a future eBook.

<b>Stage 1:</b> <b>Knowledge Acquisition</b>	<p>The premise for this stage is to learn something new that is known to work. Training is the solution to the problem of people not knowing what to do, why to do something, and how to do it – and as applicable, when and where to do it. There are two major concepts in this stage:</p> <ul style="list-style-type: none"> <li>• The training content must be known to produce results when used</li> <li>• You should use sound instructional system design principles to ensure learning occurs as efficiently and effectively as possible. If you want above-average results, course development and curricula development, especially for eventual skill development and certainly for highly-effective sales onboarding, require specialized knowledge and skill.</li> </ul>
<b>Stage 2:</b> <b>Knowledge Sustainment</b>	<ul style="list-style-type: none"> <li>• Knowledge sustainment, also referred to as training reinforcement, can include discussions, quizzes, assessments, or even having sales reps present what they learned/teach others what they learned.</li> <li>• There are a series of Learning Reinforcement Systems on the market today as well. These are software products that send out questions, usually a few a week, which your learners/sales reps can answer on their smartphone, other mobile device, or computer. A Q&amp;A format has been proven by research to increase retention dramatically. Most of these systems include options for gamification and collect the Q&amp;A data behind the scenes to offer analytics on what topics are best understood, or which individuals may need reinforcement or coaching on certain topics.</li> </ul>
<b>Stage 3:</b> <b>Skill Development</b>	<ul style="list-style-type: none"> <li>• In this stage, the goal is to provide purposeful practice opportunities at progressive degrees of difficulty in a safe learning environment, rather than practicing on your prospects and clients. Purposeful practice can occur in training classes (classroom or virtual), supported by technology, or in post-training practice sessions. It's best to put learners in very realistic scenarios, with the types of buyer roles they'll encounter, in vertical or industry-specific settings. The more the simulations can mimic the real encounters they'll have, the better it will prepare them.</li> <li>• Skill development can include one-way practice (by oneself or submitting a recording for review and asynchronous coaching), role playing with others, or participating in virtual simulations. Offering a feedback loop and a chance to incorporate that feedback will foster the best development.</li> <li>• Role playing sometimes has a bad reputation in sales. It shouldn't. The power of practice is well documented and accepted in other professions. For more about that, and ways to improve practice effectiveness, see <a href="#">this blog post on purposeful practice and sales mastery</a>.</li> </ul>
<b>Stage 4:</b> <b>Skill Transfer</b>	<p>This is a common failure point for training. For various reasons many learners do not apply what they learn in training on the job. Fostering transfer should be a major component of any program aimed at improving sales skills and behaviors. Jobs aids, mentoring, assisted preparation, ride-alongs, call-monitoring or recording, and coaching are low-cost, low-tech, and highly-effective methods. Today, there are many technology-enabled ways to support transfer as well, which I'll address in the next section.</p>
<b>Stage 5:</b> <b>Skill Mastery</b>	<p>Just because a sales rep learned something, remembered it, practiced it, and tried it, doesn't mean they did it well the first time, will continue to use their new skill, or will get better on their own. The last of our 5 Stages is a purposeful approach toward guiding mastery. Again, while technology is advancing rapidly to support mastery, the surest path to success is field observation, training, and coaching with feedback from frontline sales managers. Technology is an enabler, for both the sales rep and manager, but focused attention is what produces excellent results. My <a href="#">eBook on Sales Coaching Excellence</a> available through Fast Lane Digital offers additional insight to accomplish this.</p>

## How Sales Technology, Other Tools and Services Can Support the 5 Stages

There are ways that sales enablement technology, other tools, professional services, internal sales enablement support services, and of course, frontline sales managers, can support each of the 5 Stages.



**Note:** The below table provides a partial list of options per stage. In terms of the software vendors mentioned, my goal is to offer multiple examples in each stage. This is not, however, an inclusive list, an endorsement for certain vendors (although by way of disclaimer, we do partner with several in our sales transformation practice), nor meant to disparage any vendor by exclusion (especially). Selecting the right sales enablement stack for your company is a process that is too detailed for inclusion here. Also note that the vendors mentioned specifically support the 5 Stages, so you will not see some of the other well-known Sales Asset Management/Content Management systems or other tools that are considered Sales Enablement technology, unless they do.

<p><b>Stage 1:</b> Knowledge Acquisition</p>	<ul style="list-style-type: none"> <li>• <a href="#">Adobe Captivate</a>, <a href="#">Articulate</a>, and other vendors from <a href="#">this list</a> of HTML5 elearning authoring tools, along with many training-focused sales enablement software vendors such as <a href="#">Allego</a>, <a href="#">Brainshark</a>, <a href="#">LearnCore (now merged with Showpad)</a>, <a href="#">MindTickle</a>, <a href="#">SalesHood</a>, <a href="#">Veelo</a> and <a href="#">others</a>, enable elearning authoring and various levels of curriculum management and more.</li> <li>• Other organizations such as <a href="#">CorpU</a> or <a href="#">Open edX</a> offer virtual learning platforms.</li> <li>• Virtual instruction (often referred to a virtual instructor-led training or vILT) can be provided through vendors such as <a href="#">Adobe Connect Learning</a>, <a href="#">Cisco WebEx</a>, <a href="#">LogMeIn/GoToTraining</a>, Refined Data's <a href="#">Vantage Point</a>, and <a href="#">Zoom</a>.</li> </ul>
<p><b>Stage 2:</b> Knowledge Sustainment</p>	<p>Learning reinforcement systems are offered by <a href="#">Axonify</a>, <a href="#">count5</a>, <a href="#">Mindmarker</a>, <a href="#">Qstream</a>, and others, as well as through some sales enablement software providers such as <a href="#">Allego</a> and <a href="#">LearnCore</a>. These products help you assess knowledge, reinforce learning to improve retention, and capture data in the background to help managers know who may need further reinforcement or coaching.</p>
<p><b>Stage 3:</b> Skill Development</p>	<ul style="list-style-type: none"> <li>• Virtual coaching systems are a common feature in training-focused sales enablement software today – the same sales enablement vendors mentioned in stages 1-2 offer these.</li> </ul>

	<ul style="list-style-type: none"> <li>• There are also dedicated systems as well, such as <a href="#">CommericalTribe</a>, <a href="#">HireVue</a>, and <a href="#">Rehearsal</a>. These companies primarily offer one-way messaging, which is recorded and coached.</li> <li>• Companies like <a href="#">Bambu</a> (full sales-cycle practice on simulated deals) and <a href="#">Sales Practice Pros</a> (telephone role plays, coaching, and recordings) offer opportunities for practicing dialogue and realistic sales conversations versus one-way messaging.</li> <li>• Companies such as <a href="#">EmpowerTheUser</a>, <a href="#">Selleration</a>, <a href="#">Syandus</a>, and <a href="#">Virtual Speech</a> offer the ability to create role plays in virtual simulated environments.</li> </ul>
<p><b>Stage 4:</b> Skill Transfer</p>	<ul style="list-style-type: none"> <li>• <a href="#">DSG Consulting</a>, <a href="#">GuideMe</a>, <a href="#">Membrain</a>, <a href="#">Mindmatrix</a>, <a href="#">Playboox</a>, <a href="#">Sales Result Inc.</a>, <a href="#">Revegy</a> and <a href="#">WalkMe</a> are examples of companies who offer digital sales playbooks or workflow-integrated, electronic performance support systems (<a href="#">EPSS</a>) that guide sales reps in implementing and using what they have been taught.</li> <li>• Simple job aids are often the least-expensive form of performance support and still work very well.</li> <li>• Manager Toolkits or “Meeting in a Box” kits can guide managers on how to run team meetings or help individual sales reps prepare to apply what they learned in training with real prospects and customers.</li> <li>• Manager ride-a-longs and call-alongs remain some of the best ways to encourage, ensure, and validate real-world application, as well as to coach for skill development and more effective transfer.</li> </ul>
<p><b>Stage 5:</b> Skill Mastery</p>	<ul style="list-style-type: none"> <li>• In this stage, conversation intelligence analysis software, often powered by artificial intelligence, has risen as a new sales enablement category in the past few years. A common phrase I hear used to describe conversation intelligence is “game film for sales,” making an analogy to professional sports teams whose coaches analyze film from previous games to improve strategy.</li> <li>• Companies like <a href="#">Chorus.ai</a>, <a href="#">ExecVision</a>, <a href="#">Gong.io</a>, and <a href="#">SpearFysh</a> allow you to record sales calls and client meetings, to analyze the conversation for a variety of purposes, one of which, of course, is better sales coaching. They also provide transparent visibility into how well your sales force is adopting the best practices they’ve been taught, while allowing you to conduct research to continually evaluate the effectiveness of top producer practices and evolve them.</li> <li>• Field training and coaching from frontline sales managers remains a pillar of performance improvement and is required to foster sales mastery. For more on sales coaching excellence, download my <a href="#">eBook on Sales Coaching Excellence: The Path to a Best-in-Class Sales Force</a>.</li> </ul>

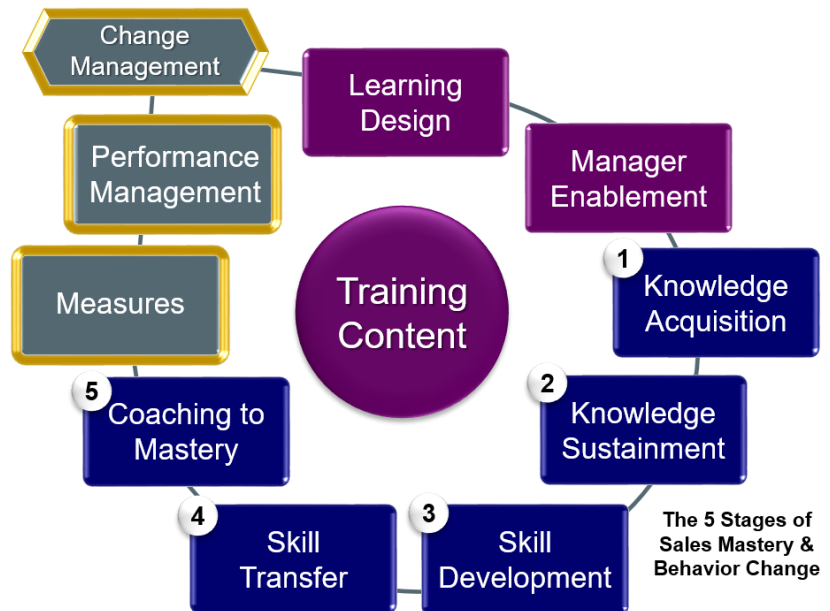
The 5 Stages chart and the two subsequent tables contain a lot of information to process. To simplify and maintain clarity and focus, start with the chart and focus on What, How and Why. If you start with a simple plan to do something to address each stage and foster the purposeful journey from Knowledge Acquisition through Sales Mastery, you will be far ahead of most companies. You will also have a far greater chance of achieving better business outcomes through your sales training, because of your approach.

## The Sales Learning System: Cement the Change

After managing through these stages, and possibly implementing technology to further support them, you certainly want the changes to stick, right?

Of course you do. Yet change management research shows that many organizations give up far too early, resulting in people migrating back to what they used to do.

These next steps will help you overcome that challenge, by measuring results, managing performance, and continuing to lead and manage change until the new behaviors become “the way we do things around here” (which is my favorite simple definition of organization culture).



**Measures:** As mentioned earlier, managers should “inspect what they expect,” because “what gets measured gets done.” These are both colloquial phrases that are accurate, well known, and yet often ignored. To analyze areas for improvement and inspect what they expect, managers need data. You can establish lead and lag indicators for both learning progress and sales performance, and work together with learning and sales leaders to determine which metrics should be key performance indicators and communicate them regularly.

**Performance Management:** Imagine knowing exactly what your employees should do to get the best results, delivering training on what to do, and then never holding people accountable to do what they were taught. That’s ridiculous, right? Yet it happens all the time and was cited as the single biggest barrier to training effectiveness in ATD’s last annual [State of Sales Training](#) report. The 5 Stages framework addresses this well, but in the end, there must be [consequences for both doing what’s expected, and what’s not](#). Along with other aspects of [performance management](#), this will help to address the lack of accountability and improve focus and adoption.

**Change Management:** Much of what we do in sales enablement and sales training is designed to foster good sales behavior. There is very little that we do that is not a change project, designed to get the maximum possible number of sales producers using the best possible process and methodology. Given that, we should learn and use the best practices for change leadership and change management. This is another major topic, so rather than go deeper here in this eBook, I will provide additional reading and resources for you to explore.

## Additional Reading on Change Management

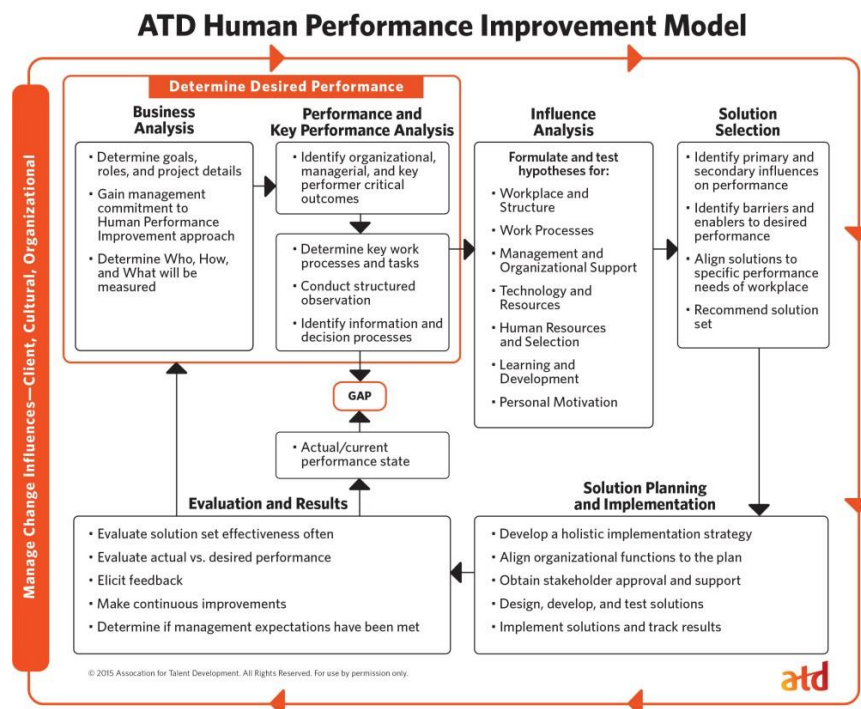
- <https://www.amazon.com/John-P.-Kotter/e/B001H6NM1K/>
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- <https://www.amazon.com/Theory-Practice-Change-Management/dp/0230210694/>
- <https://www.amazon.com/Beyond-Change-Management-Breakthrough-Leadership/dp/0470648082/>

**Note:** [Better Change](#) is technically out of print but still available. It remains, in my opinion, one of the most robust and practical resources for effectively managing organizational change efforts.

## Additional Recommendations for Becoming a Sales Change Expert

According to separate studies by McKinsey and John Kotter, seventy percent of change projects fail to produce the intended result. That sounds ominous, but it also means that thirty percent succeed. Learning the best practices will increase your chance of success. You can study and learn about the wider world of business performance improvement, much of which is largely ignored by the sales profession. In addition to the change management resources already provided, I recommend that you learn about:

- [Organization Development \(OD\)](#)
- [Organization Behavior \(OB\)](#)
- [Performance Consulting](#)
- [Human Performance Technology \(HPT, also see \[this\]\(#\) and \[this\]\(#\)\)](#)
- [Human Performance Improvement](#)
- [Systems Thinking](#)
- [Lean](#) and [Six Sigma](#)
- [Agile Methodology](#)



## Final Thoughts

I hope this eBook has been and will continue to be helpful for you. I know it's a lot to absorb. The good news is that the Sales Learning System with the 5 Stages of Sales Mastery & Behavior Change has been field tested and proven effective. It works.

While systems approaches involve a lot of moving parts, complex does not always mean complicated. I think you'll agree that independently, the concepts are relatively simple. However, that doesn't mean they are easy to implement.

If the whirlwind of daily work activity prevents you from succeeding at first, or if this is vastly different than your current company's approach and you find it difficult to gain buy-in to making wide scale change, I urge you not to give up, and to take things one step at a time.

If you run into challenges and want support, we've got your back. My partners and consultants in my sales transformation practice and I have extensive experience working with sales teams of all shapes and sizes, and we've helped many organizations build their bottom line by getting the most out of their people. If you need support on your journey toward sales mastery or with any part of your Sales Learning System, [we're here to help](#).

# Appendix

## About the Author



Mike Kunkle is the founder and sales transformation architect for [Transforming Sales Results, LLC](#). He's a respected sales transformation leader and an internationally-recognized sales training and sales enablement expert.

Mike has spent over 30 years in the sales profession and 24 years as a corporate leader or consultant, helping companies drive dramatic revenue growth through best-in-class learning strategies and his proven-effective sales transformation methodologies. He consults, advises, writes, speaks, leads webinars, designs sales learning systems that get results, and guides clients through all aspects of their sales transformation.

## Industry Recognition

- <https://ambition.com/blog/entry/2017-11-02-100-world-class-sales-coaches-and-trainers/>
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