



DISH's Blended Training Gives Learners Real-Life Scenarios to Close Sales

DISH Network
Best Use of a Blended Learning Program
August 2018



Company Background



Company-at-a-Glance	DISH Network is a direct-broadcast satellite service provider, specializing in paid television and other connectivity and entertainment services.
Headquarters	Englewood, CO
Year Founded	1980
Revenue	\$14.4 billion (2017)
Employees	17,000 (2017)
Global Scale (Regions that you operate in or provide services to)	U.S., Latin America, Europe and Asia
Customers/Output, etc. (Key customers and services offered)	Direct-broadcast satellite, live TV streaming, pay-per-view
Industry	Pay TV
Stock Symbol	DISH
Website	www.dish.com

Budget and Timeframe

Number of (HR, Learning, Talent) employees involved with the implementation?	8
Number of Operations or Subject Matter Expert employees involved with the implementation?	15
Number of contractors involved with implementation	3
Timeframe to implement	12 months
Start date of the program	January 2016

Business Conditions and Business Needs

Today's customers shopping for TV service have countless options, from traditional cable and satellite TV services to streaming options. In this competitive pay-TV market, a sales associate has five to 10 minutes to impress a customer calling the sales line and convince him or her that DISH Network offers the best value, service and technology in the market.

DISH's Sales Training and Support (STS) organization's objectives are to assess the tools, processes and needs of the sales teams to help achieve the maximum profit for the company. The biggest need of the sales teams is to develop the most effective sales consultants ready to provide a world-class experience to potential customers and drive profitable growth. High-performing phone sales associates exhibit the following attributes:

1. Strong knowledge on products, service and business rules.
2. Excellent communication skills.
3. Proficient navigation in the order entry tool.
4. Seamless transition and adaptation in the sales flow.

To help new employees reach the performance level of a successful sales associate and generate maximum sales in their first few weeks on the phone, the new employee training was evaluated and the following training opportunities were identified.

The sales training was highly segmented. For example, new associates would learn about products and services in the first few days. Then they would talk about sales skills and

how to communicate with the customer. After that, they would learn to build an order in the order entry system called Axiom. There were not many opportunities to put all their knowledge and skills into practice. In their first few weeks on the production floor, they had a hard time putting them all together and having a robust conversation with their customers while navigating Axiom fluently. They would get occupied with entering information in the system, miss what the customer said, sound inattentive or incompetent and lose control of the call.

The Axiom training was heavily lecture-based and static. With the absence of a training version of Axiom, trainers showed the production version of Axiom on the screen and explained to them how to use it. Associates took notes but barely had any hands-on experience. Another challenge with this method was that trainers could not demonstrate what would happen after customer qualification because it required a customer's personal information such as Social Security Number and date of birth. Trainers relied on a series of screenshots to help trainees understand the impact of customer qualification on their monthly bill, upfront cost and offers. New employees would have difficulties locating information in the tool, provide inaccurate information to customers and make errors in the order. Another concern with this practice was affecting the production version of Axiom and generating unintended sales leads, skewing figures used for sales reporting.

Trainers conducted role-playing exercises to provide learners with opportunities to practice. Some trainers preferred a controlled environment where the trainer would play the customer and one learner would play the associate. The rest of the team watched what the selected person was doing. It took several hours for everyone to get a chance to practice. Some trainers created written role-play scenarios, paired up participants and had them practice with each other. Since learners had limited experience with live calls, they would often play an unrealistic customer, and as a result, these scenarios would easily get derailed.

Learners were exposed to the actual job only for a limited time when they were sitting next to a sales associate and watching what they were doing. It was discovered that, unlike customer service agents who were eager to teach new employees, sales associates did not want to have new employees take phone calls for them for the fear of their commission being impacted. Another concern with relying on this type of hands-on-only training was that this was an uncontrolled environment. One learner could be

exposed to common scenarios just covered in training while another might get stuck on a complex call beyond their knowledge level. There had been many efforts to systemize this process by creating a team of on-the-job trainers who could guide new employees to take live calls. These efforts always met strong pushback from Operations — as every lost sale means loss of revenue.

Overview

To create a training program that would solve the identified issues and help develop successful sales associates, new hire classroom observations and discussions with the training delivery team were conducted. The research showed that effective trainers introduced Axiom (order entry system) early in their training and attempted to incorporate the order entry process into their sales flow training. The conclusion was drawn that the order-entry training should not be limited to teaching how to build orders but should serve as an environment where learners apply all the knowledge and skills they have acquired.

To provide that environment, the idea of a comprehensive training suite was conceived with a blended approach of ILT, eLearning, Atlas (internal knowledge base), and simulation. It consists of:

1. **Axiom eLearning:** This tool walks learners through the basic step-by-step flow, layout, and functionality of Axiom.
2. **Axiom Simulator:** This tool provides a safe, controlled environment where learners can build different types of orders without affecting live customer accounts.
3. **Self-Guided Scenarios (ILT):** Scenarios are written to cover various topics and pose challenges to learners while they practice building different types of orders. Trainers work as mentors while learners build orders guided by scenarios.
4. **Skill Drill Scenarios (ILT):** Scenarios are written elaborately to be used for role plays. They are designed to encompass not only the most common sales situations but also throw curve balls and build the habit of thinking outside the box.
5. **Axiom User Manual:** The manual is available on the associate knowledge base called Atlas. It demonstrates how to set up complex orders, as well as basic orders. It also lists unique situations and actions to take in those situations that



the new hire curriculum cannot dive into, including errors and alerts. It is used as reference material throughout the training and beyond.

This training suite was deployed over time throughout all sales channels and fulfilled two major training objectives:

1. Provide a training environment as close to the production version as possible where learners can apply their knowledge on products, service and business rules.
2. Incorporate drills that allow learners to practice their communication skills, sales flow and navigation in the order-entry tool and knowledge base.

Design of the Program

Axiom Training Suite was designed to incorporate order entry training in every major topic, build upon what learners have already learned, focus on skill-building rather than knowledge and provide the most realistic experience to the learners. Learners are exposed to Axiom on the morning of the fourth day after they have acquired knowledge on products and services that DISH offers. They observe sales associates use the tool that afternoon. From then on, every major topic includes order entry scenarios. Learners practice navigating Axiom while applying the knowledge they have just acquired. From the sixth day, learners start practicing the sales flow and communication skills in addition to applying their product knowledge and navigating the tool. On the eighth day, they experience a simulated production floor.

The structure of the training program is:

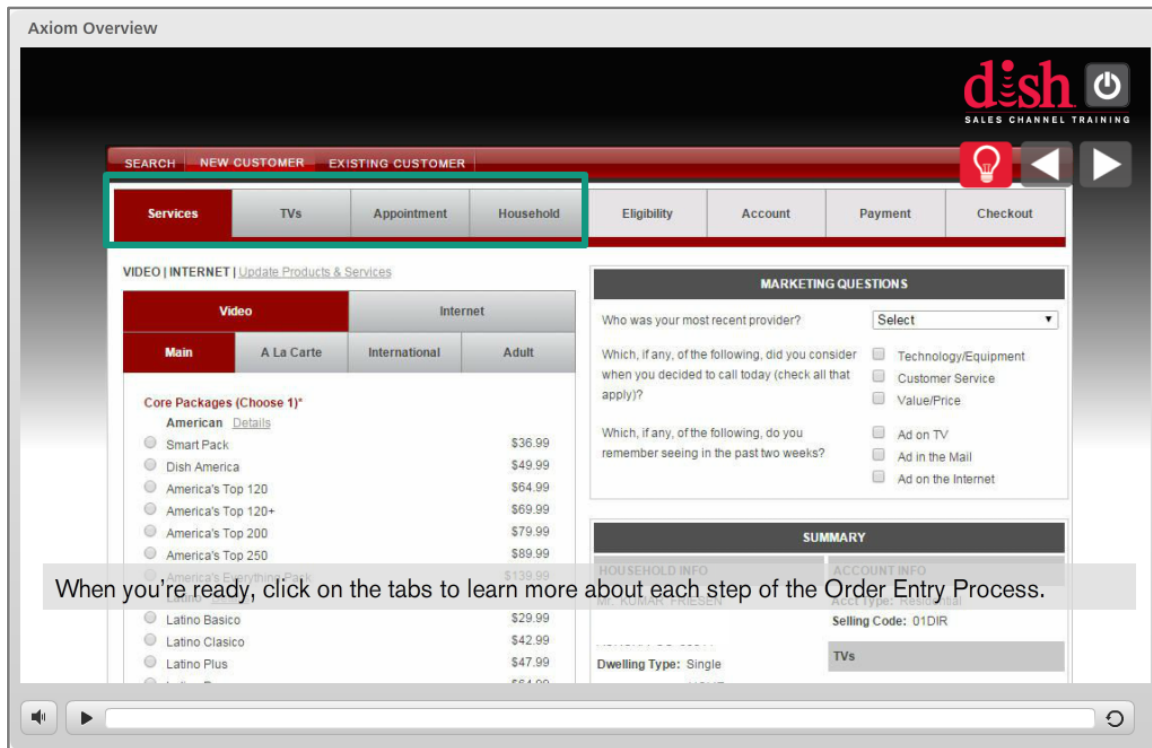
1. Introduction to Axiom

Materials used: Axiom eLearning.

The Axiom eLearning course was built using Storyline2 to provide learners with a guided but interactive experience of building a simple order. Learners take the Axiom eLearning as an introduction to the order-entry training right after basic product and service training. As shown below, the course provides directions on each step and explains a few key points. Learners acquire an elementary knowledge of the tool,

undergoing the step-by-step process. This experience places all learners in the class on the same page early.

Figure 1: Axiom Overview



Source: DISH Network

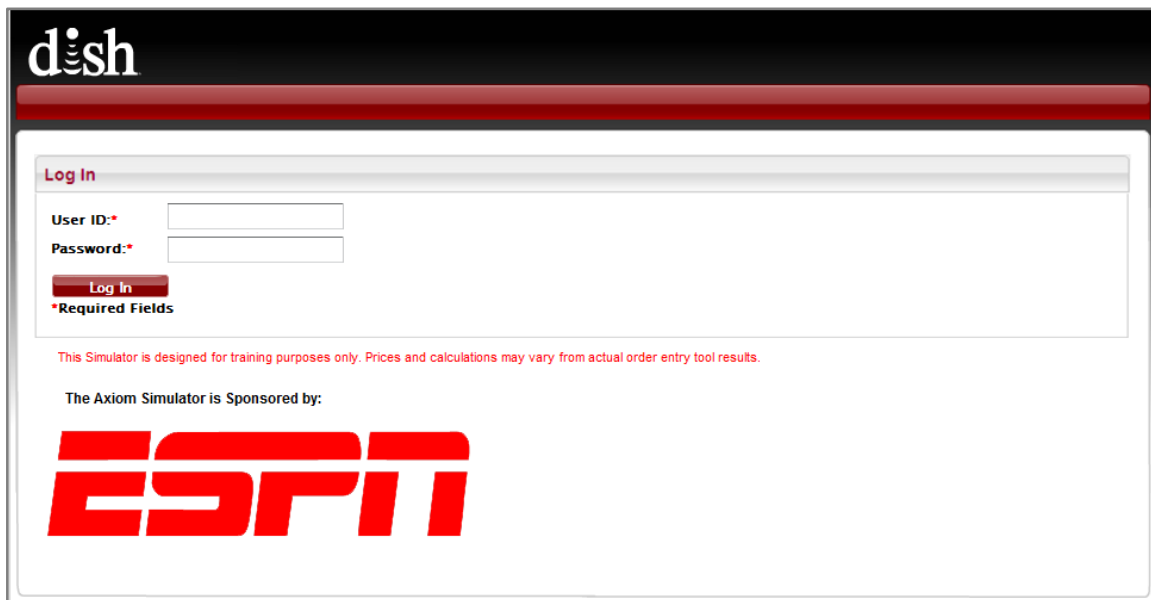
2. ILT: Trainer Demo

Materials used: Axiom Simulator.

The Axiom Simulator (shown below) is a coded web application and updated on a monthly basis to align with business changes. This tool provides a safe, controlled environment to build orders without affecting live customer accounts. The trainer demonstrates how to build an order using the Axiom Simulator on the big screen. Learners pull up the Axiom Simulator on their computer and follow along with the trainer's actions to build an order. Learners take note of the key points in their book. This guided ILT replaces the traditional lecture-based ILT with a robust experience involving auditory, visual and kinesthetic learning elements, and builds confidence in the learners. After the trainer demo and a few practices, learners go out to the

production floor and observe an existing sales associate use the production version of Axiom. The preliminary experience of using the Simulator immensely helps learners make sense of the existing associate's navigation and conversation.

Figure 2: Log-in Screen



Source: DISH Network

3. Order Entry Practice



Materials Used: Axiom Simulator and Self-Guided Scenarios.

All order entry scenarios are labeled with targeted knowledge and skills. After a major topic is covered, learners practice a scenario or two targeted on that topic. The scenarios not only provide mock customer information needed to build an order but also pose questions that drive learners to think critically and solve problems. For example, the mock information generates different customer types and qualifications, requiring the learner to adapt to various situations. After building an order, learners are required to explain the bill and upfront payment and to read all applicable disclaimers as they would to their customer. Learners become the owner of their learning, rather than a receiver. The trainer acts as a mentor, providing assistance, answering questions, checking the accuracy of the orders and providing feedback. This allows learners to immediately practice what they learned without



affecting the production of Axiom. It exposes learners to all types of scenarios, teaches them where to find information they need and ultimately to become independent.

Figure 3: Self-Guided Scenarios

<p>DIRECT SALES NEW HIRE AXIOM ACTIVITY</p> <p>SELF-GUIDED SCENARIO 6</p> <p>AFTER INTERNET TRAINING</p> <p>DARREN DYER</p> <p>Name: Darren Dyer Service Address: 234 Hill Street, 49012 Billing Address: Same as service address Phone Number: (Cell) 912-788-4454 Only has a cell phone. Wants text messages from technician Most Recent Provider: Had no TV recently Reason for Calling (Marketing questions): Technology/ Equipment: Ad on the Internet Programming: Fusion, Tennis Channel, The SEC Network, FOX Sports 1 & 2 Equipment: 1 HDTV and 1 SDTV. Interested in DISH Anywhere live streaming feature</p> <p>Offers: 2-Year TV Price Guarantee. Free Offers are nice. Internet: Interested in leaving the Internet from DISH. Online school and some streaming Appointment: Earliest possible time Email Address: ddyer@email.com SSN: 333-33-3333 DOB: June 12, 1993 Card: Master 2002.1222-9555-6555 January 2020 Security Code: 8888 Security Code Reminder: My lucky number Household Member: Jonathan Bacon eAutoPay: Yes</p> <p>ANSWER THE FOLLOWING QUESTIONS AFTER COMPLETING THE ORDER.</p> <ol style="list-style-type: none"> Which Core package meets Darren's needs? What plan does he qualify for? What is due today for him if he chooses Hopper with Sling to get DISH Anywhere? What is his first month bill amount including taxes? Darren says he has only \$200 for payment and asks if you can lower the amount due. He doesn't want to give up HD or DVR functionality. How would you right-size him? Will Darren be able to get the Internet service from DISH? <p style="text-align: right;">H-18</p> 	<p>AXIOM ACTIVITY DIRECT SALES NEW HIRE</p> <p>SELF-GUIDED SCENARIO 7</p> <p>AFTER AXIOM TRAINING</p> <p>AHMED ALI</p> <p>Name: Ahmed Ali Service Address: 55 Grand Ave APT B, 66263 Billing Address: P.O. Box 233, Denver, CO 66263 Phone Number: (Home) 201-522-3636 (Cell) 201-200-8001 Wants text messages from technician Most Recent Provider: No Provider Reason for Calling (Marketing questions): Many people in his complex have DISH. Value/Price Programming: Arabic channels, specifically ART America, Al Jazeera, Al Arabiya, BBC America, EuroNews Equipment: 2 SDTVs. Likes to record.</p> <p>DISH has to offer: Internet: Not interested in Internet Appointment: Available on Sunday morning Email Address: Aali@email.com SSN: 555-55-5555 DOB: June 5, 1962 Card: Visa 1888-0000-9999-7777 January 2019 Security Code: 0909 Security Code Reminder: Father's birthday Household Member: Aisha Ali eAutoPay: No</p> <p>Offers: Wants to take advantage of all the free offers that</p> <p>ANSWER THE FOLLOWING QUESTIONS AFTER COMPLETING THE ORDER.</p> <ol style="list-style-type: none"> Which Core package meets Ahmed's needs? What plan does he qualify for? What is the activation fee for Ahmed and why? Ahmed doesn't want to spend extra money for a Hopper solution. If you right-size him and select the Non-Hopper solution, what is due today for him including taxes? What is his regular monthly bill amount including taxes? <p style="text-align: right;">H-19</p> 
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Source: DISH Network

4. Phone Simulation

Materials used: Axiom Simulator and Skill Drill Scenarios

The trainer breaks the class into groups of three. One plays a customer, one plays a sales associate and the other plays an observer. Only the customer and observer are allowed to see the assigned scenario. The observer sits next to the associate. The customer sits away from the associate, so they will not see each other's nonverbal expressions. The customer dials the phone extension of the associate. The customer follows the background information and the basic flow provided in the scenario to play their part. The associate incorporates everything they have learned — communication skills, sales flow, knowledge on products and service, resources, etc. — to close a sale while building the order. The observer rates the associate using the

observation form and provides feedback at the end. They switch roles and practice the next scenario. The trainer acts as the floor supervisor, observing, answering questions and helping the associate close the sale.

Figure 4: Skill Drill Scenario

SKILL DRILL SCENARIO 8

MASTER

BACKGROUND STORY

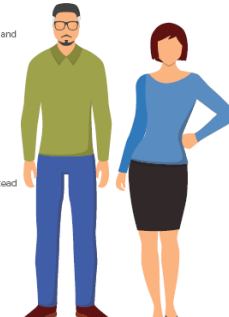
- You (Steve or Stephanie) just went through a divorce. You're moving into an apartment in 3 weeks.
- Your spouse used to handle all the bills. You have no idea what provider you had or how much you paid per month.
- Your credit is not good because your spouse ruined it.
- Now you have to watch your budget. You plan to shop around for the best price.
- You have enough money to pay upfront fees from selling your furniture and valuables, but you don't want to waste your money.

WHEN YOU ARE READY, DIAL EXT. _____

OBSERVATION & DEBRIEF QUESTIONS

MAKE NOTES AND USE THESE QUESTIONS TO PROVIDE FEEDBACK TO YOUR PARTNER.

- What package did the Associate offer for TV and Internet?
- Did the Associate explain how much you will save over the year and show the value of paying the upfront fee?
- How did the Associate respond to your question regarding no Internet availability?
- How did the Associate explain the benefit of signing up now instead of waiting until after you move?
- Did the Associate read disclosures?



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SKILL DRILL SCENARIO 8

MASTER

Opening Line: "I'm moving into a new place and trying to see what my options are."

Provide info based on questions

Name: Steve (Stephanie) Sakamoto
Service Address: 65 Salem Avenue APT 1A, 33967
Billing Address: Same as service address
Phone Number: (Cell) 303-555-1212
No home phone
Most Recent Provider: "I can't recall it. My ex took care of those things."
Reason for Calling: Moving after divorce & trying to save.

Saw some DISH mail pieces
Programming: Hallmark Channel, Animal Planet, ID Channel, FYI
Equipment: 1 TV "I'm not sure if it is an HD or SD since I am getting a second-hand TV from a friend."
Internet: "How much is it? I will sign up only if it meets my budget. I use Internet for social media, streaming, photo sharing."

Sales Flow continues

When Associate attempts qualification, INTERRUPT WITH

"Wait! Can I just get a quote?"

If the quote is more than \$34.99

"I saw that your basic package is \$34.99. Why is it so expensive?"

If answer is good

**SSN: 333-33-3333
 DOB: December 24 1980
 Card: Master 5555-1111-2224-2222 May 2019
 Offer: 2-Year TV Price Guarantee**

If the quote is \$34.99 or less

"It includes all my favorite channels, right?"

If the new quote is more than \$34.99

"That doesn't really make sense, but I still want to see if I am qualified for a good deal."

If answer is weak

Sales Flow continues

After hearing a new quote, INTERRUPT WITH

"Does that include my Internet?"

If benefits of breaking bundle is explained

"OK, I understand what you mean. I'm shopping around now. I'll call you back after I move into the new place."

If the Associate creates sense of urgency

**Appointment: In 3 weeks
 Email Address: ssakamoto@email.com
 Security Code: 0102**

If benefits of breaking bundle is not explained

"If the Associate fails to create sense of urgency

"I'll have to shop around. Bye! Hang up"

Reminder: My aunt's birthday eAutoPay: Yes

Sales Flow continues

H-39

Source: DISH Network

Every learner gets to practice multiple scenarios that are realistic and designed to target common challenges. Since the basic flow is written for the customer, they stay within their character and rarely deviate from accomplishing the learning goals set for the scenario. Learners overcome any first-day jitters through this experience. By the time they go to the production floor and take live calls, they are comfortable navigating the order entry tool and other resources. Instead of being overwhelmed by the multiple tasks that they must manage, they focus on the customer, listening to them, finding solutions and closing the sale.

Delivery of the Program

In consideration of budget and resources, the philosophy of “continuous improvement” was adopted for this program. Each element of this training suite is constantly evaluated and evolving based on user feedback and business changes. Due to this approach, there was never a clear date for the deployment or the completion of this program. Every item in the training suite was built and improved in continuous collaboration with the training delivery team to meet the needs of the field.

- **Axiom Simulator Initial Launch** — In the third quarter of 2013, a primitive version of the Axiom Simulator containing one order flow was launched. Two major flows were added to it at the end of 2013 and early 2014. Since then, new features and additional flows have been added every month.
- **Interactive Axiom eLearning** — In the third quarter of 2014, the new interactive Axiom eLearning course was released.
- **Axiom Scenario Activity** — Throughout 2015, several self-guided scenarios were developed and published as separate activity sheets. As the simulator became more robust and complex, simple scenarios were replaced with complicated ones that included customer objections and other obstacles to closing a sale. In January 2016, the official Axiom Activity book that includes 10 self-guided scenarios and ten skill drill scenarios was published and piloted. Multiple small pilot sessions were conducted in four call center sites and best practices and feedback were collected during this time. The training suite to this day maintains the mentality of being in an eternal pilot stage. For example, in an effort to add a game element that appeals to kinesthetic learners, a new activity called “Sales Cubes” (shown below) is being piloted. This game was designed to prepare a sales associate for any situation by developing flexibility and adaptiveness. It will be continuously reviewed and evaluated for its effectiveness.

Figure 5: Sales Cubes



Source: DISH Network

Change Management Efforts

The Sales Operations team welcomed this change. This program took the responsibility from their shoulders of providing substantial on-the-job training to trainees and removed the risk of negatively affecting their sales numbers. The trainers who had worked as partners in the development of this program were excited about the launch. The most pushback came from the trainers who were comfortable with the traditional method and afraid to transform themselves from a knowledge bearer to a mentor/facilitator. They also were hesitant to run the phone simulation activity since it required some prep-work and the class could seem chaotic with multiple people talking during the activity. They raised a concern that the simulator had limitations and did not allow them to build complex orders.

To gain trainers' buy-in, continuous communications were made to the team that the program would not stop improving and that feedback would be collected to make



enhancements. To deliver what was promised, trainer feedback was immediately evaluated and reflected on the next version of the Simulator and scenarios.

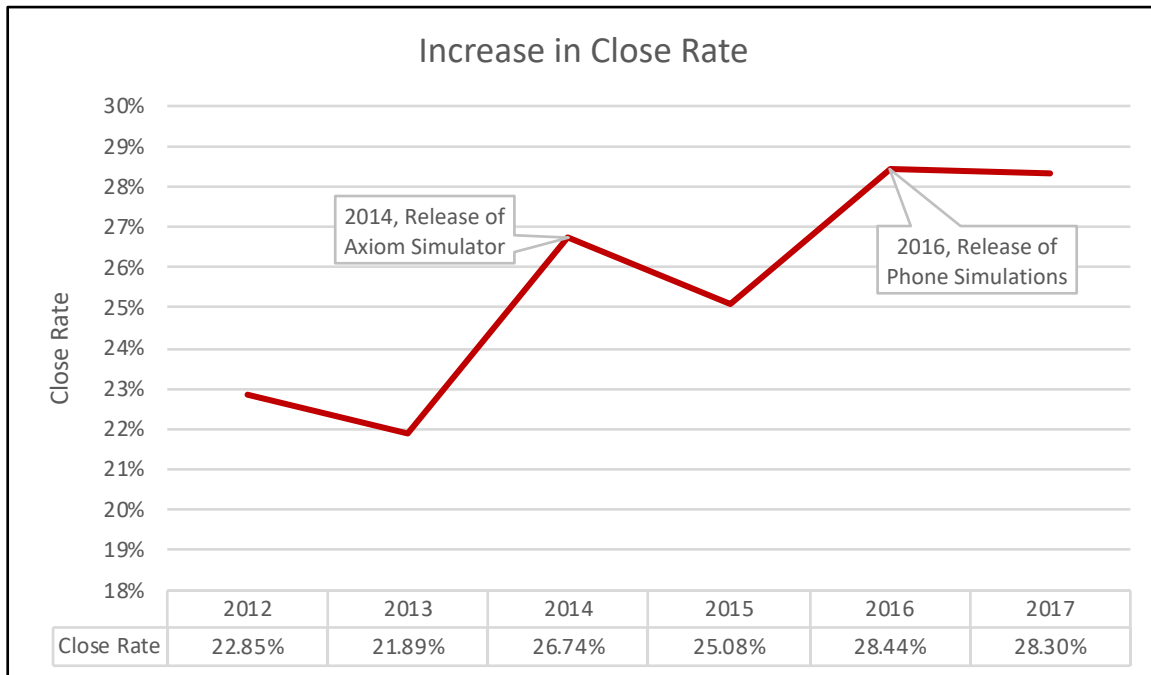
Trainers who had been involved in the development worked as advocates for the program. They spoke to the trainers who wanted to stick to their old style of training, ran demonstration sessions to show how to run the phone simulation activity and aided them with the first-time trial.

Once the trainers saw how the new approach reduced training time and prepared their new hires for the production floor, they adopted it with more enthusiasm.

Measurable Benefits

- **Days Spent in Class.** The most striking impact that the Axiom Training Suite made is reduction of training time. Before the Axiom Training Suite was launched, new hires officially spent 10 days in class before going to the production floor. Trainers would extend the class time to 11 to 12 days when they felt the class was not ready to take phone calls. In the summer of 2016, the new agenda was launched, shaving 1 ½ days from the class time and sending new hires to the production floor to take calls early. This transition was smooth and successful thanks to the holistic Axiom practice time spent in class. In 2017, more and more trainers requested that their new hires move to the production floor earlier than scheduled.
- **Close Rate.** The most important metric in sales is close rate — the number of sales in association to the number of calls received. Close rate is closely tied to an associate's competence, skills and confidence. The graph below shows the average close rate during the first two weeks of all new sales associates hired for each year.

Figure 6: Increase in Close Rate



Source: DISH Network

It is notable that the new employees' close rate jumped about 5 percentage points from 21.89% (2013) to 26.74% (2014). It was the year the Axiom Simulator was updated with the most requested order flows and robust features and interactivity was added to the eLearning course. The close rate saw another 3.36 percentage point leap from 25.08% (2015) to 28.44% (2016) when the phone simulation using multiple real-life scenarios became part of the new hire curriculum.

New Hire Experience

Starting at the end of the second quarter of 2014, all new hires complete a survey related to their classroom experience, covering 21 categories ranging from room setup to trainer knowledge. Four of those categories pertain to Axiom training and phone readiness: Axiom, opportunity to practice, confidence in using tools and confidence taking calls. The survey results show that the percentage of negative comments significantly decreased during the time the training suite was achieving major milestones.

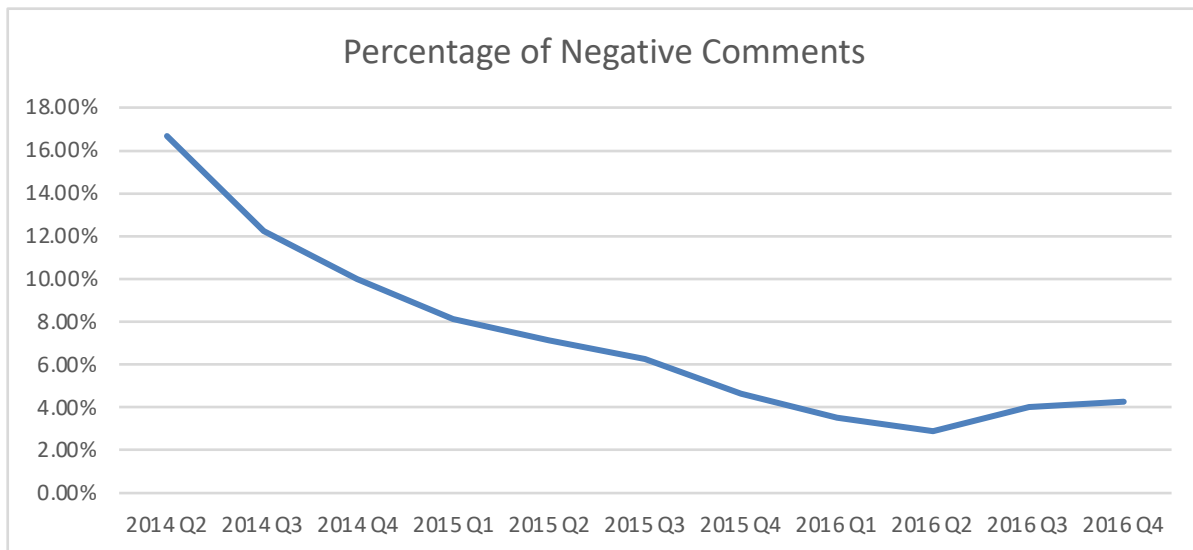
This is a testament that the Axiom Training Suite has been contributing to sales associate preparedness.

Figure 7: Axiom Training Suite Testament

	Number of entries	Number of entries related to Axiom and phone readiness	Number of negative comments	Percentage of negative comments
2014 Q2	162	24	4	16.67%
2014 Q3	1053	156	19	12.18%
2014 Q4	1212	180	18	10.00%
2015 Q1	1161	173	14	8.09%
2015 Q2	2328	297	21	7.07%
2015 Q3	2002	351	22	6.27%
2015 Q4	2359	541	25	4.62%
2016 Q1	3672	642	23	3.58%
2016 Q2	4339	692	20	2.89%
2016 Q3	4657	641	26	4.06%
2016 Q4	4770	708	30	4.24%

Source: DISH Network

Figure 8: Percentage of Negative Comments



Source: DISH Network

Overall

Key Findings

The first key finding was that new hires were showing proficiency early with the use of the Axiom Training Suite. This contributed to the decision to shave off some training time.



Based on the Training Delivery Team's feedback, it is possible to further reduce the class time in the near future.

The second key finding was that the most effective way to help new employees master a new skill is to challenge them with realistic scenarios in an environment similar to production. Thanks to the success of the program, all training materials developed by DISH's Sales Training and Support organization, regardless of length, include scenario-based activities.

Lessons Learned

The most valuable lesson learned from this program is the importance of teamwork between the Design and Development team and the Training Delivery team. The success of this program is attributed to the close working relationship of the two teams and liberal sharing of knowledge, experience and ideas. The Training Delivery team also helped the launch as advocates to hesitant adopters.

Due to the popularity of this training suite, there has been increased demand for the simulator to be constantly updated with additional functionality and business changes. This is costly and time-consuming to the DISH Sales Training and Support team to maintain the tool. There is a need for the team to research ways to optimize the simulator maintenance.

Future Outlook

The DISH Sales Training and Support team will maintain the attitude of "continuous improvement" with the Axiom Training Suite and seek more areas of enhancement in the program. It will also continue to explore different methods to place the ownership of learning on the learner, not the trainer. The DISH Sales Training and Support team will also partner with IT to redesign the framework of the simulator, which will allow for real-time updates for business changes and additional functionality.

Because of the success of this blended learning program, the DISH Sales Training and Support team will replicate this approach in other training suites.



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