



Johnson Controls Launches Data-Driven Competency Program to Elevate Sales

Johnson Controls International PLC
 Best Competencies and Skill Development
 November 2024



Company Background



Company-at-a-Glance	
Headquarters	Cork, Ireland
Year Founded	1885
Revenue	\$26.819B
Employees	~ 100,000
Global Scale (Regions that you operate in or provide services to)	More than 150 countries (2,000 worldwide locations)
Customers/Output, etc. (Key customers and services offered)	Residential, Commercial, Small to Large Scale, Onshore and Offshore, Public and Private Sector
Industry	Building Automation and Controls Technology, Software and Services
Stock Symbol	NYSE: JCI
Website	www.johnsoncontrols.com

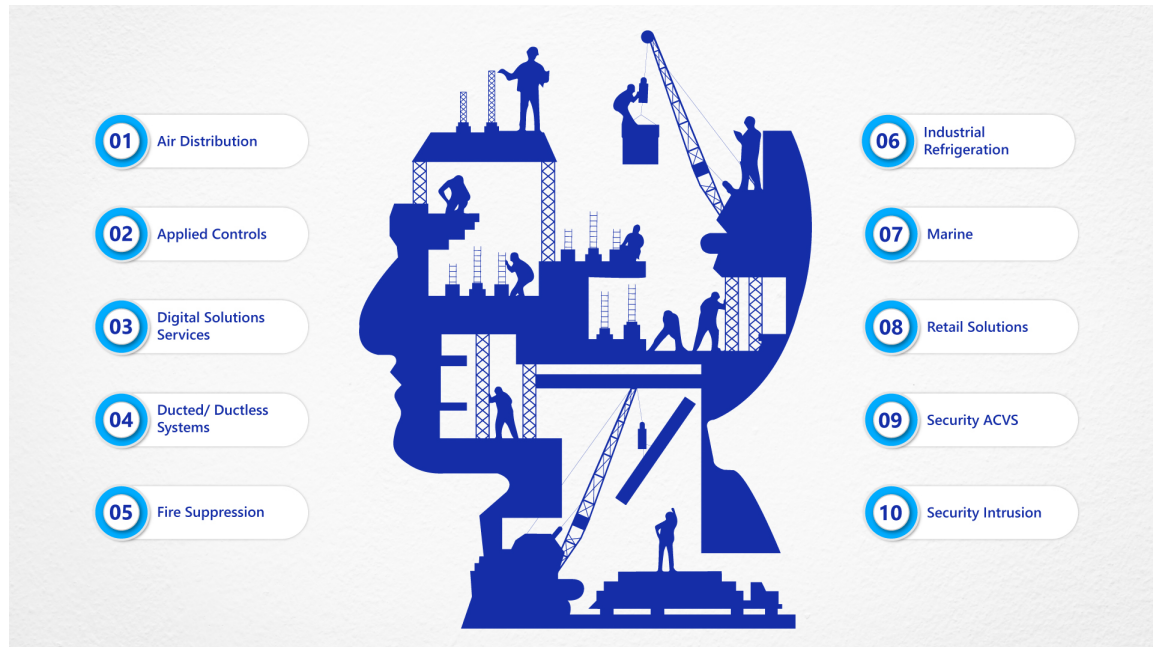


Budget and Timeframe

Budget and Timeframe	
Overall budget	\$ 148,800 (incurred from internal budget)
Number of (HR, Learning, Talent) employees involved with the implementation?	16 Stakeholders
Number of Operations or Subject Matter Expert employees involved with the implementation?	7 Stakeholders and multiple leaders that championed the program
Number of contractors involved with implementation	0
Timeframe to implement	10 months that includes: <ul style="list-style-type: none">• Framework creation: 2460 effort-hours• Assessment: 1000 effort-hours• Course creation & Translation: 1500 effort-hours
Start date of the program	North America – March 2023 Globally – September 2023

Fit to the Needs

People spend 90% of their time indoors, so it's important to invest in the buildings where we live, work, and play. This is where Johnson Controls comes in. They are changing the way people think about buildings, by creating spaces that improve well-being, achieve climate goals, and save money. With over 130,000 employees and a presence in more than 150 countries, the company's focus is on creating intelligent buildings, efficient energy solutions, integrated infrastructure, and next-generation transportation systems that work seamlessly to deliver on the promise of smart cities and communities. The core offerings of the company include:



For a company as diverse as Johnson Controls, sellers play a crucial role in realizing the company's vision and success. However, Johnson Controls, as an organization, did not have answers to some of the commonly asked questions by sellers.

- What skills and competencies do I need to succeed?
- Who will guide me to help identify my competency gaps?
- How do I start my development discussions?
- Where do I go after my Individual Development Plan (IDP) discussion?
- How to work on my knowledge gaps?

The organization lacked a clear starting point for sellers to embark on their skill development journeys, resulting in skill development discussions that were subjective and heavily reliant on personal anecdotes.

This is where the need for the Sales Builder program became evident. While the company had been conducting several salesforce skill enhancement initiatives, they were localized and lacked consistency. Also, sellers didn't always have a way to identify areas of development for them. This significantly limited their capacity to own and drive their skill development journey.



The company wanted to create a program that aimed at providing structure, consistency, and flexibility to salesforce skill enhancement initiatives. A program that could make discussions around skill development more nuanced and easier to understand. A program that was:

- Development-oriented and aimed to upskill sellers' core competencies.
- Applicable to ALL sellers globally.
- Personalized so that sellers could choose their learning.
- Hybrid, allowing sellers to opt for self-paced as well as virtual facilitated sessions.

To facilitate such a framework, Johnson Controls collaborated with its Talent Management team to identify the most impactful behaviors for sellers. High performers were interviewed to isolate their behaviors, which led to a draft model. To validate, focus group interviews were conducted with sellers across different regions, business units of Johnson Controls, and with different seller types to collect insights. Ultimately, 11 general sales competencies aligned to Johnson Controls values and business strategies were identified for sales representatives. Also, each competency was mapped to certain observable behaviors that were highlighted in the interviews and focus groups. These competencies were also mapped to indicate how they align with Johnson Controls' business leadership competencies.

The diagram below shows how the Sales Competency Framework integrates with business competencies:



To summarize, Johnson Controls needed a program that could:



- Help sellers identify focus areas for development.
- Amplify the skillset with targeted competencies.
- Be scalable and relevant for sellers across the globe.
- Facilitate collaboration with leaders to set and achieve development goals.
- Standardize sales skill-building initiatives.
- Can be reused to avoid recurring training expenses.
- Be easily accessible to the sellers, both when they are on and off the ground.

Overview

At the broadest level, sales competencies refer to a set of skills, knowledge, and behaviors that sales professionals need to possess to be successful in their roles. So, clearly defined sales competencies can orient salespeople around what is required to succeed in their role. It can also act as a diagnostic to evaluate performance, make talent decisions, and provide objective feedback.

Clearly outlined competencies serve as a catalyst for building a skilled talent pool that gives businesses a competitive edge and fosters long-term success. Competencies that are adaptable yet grounded in solid research and with long-term applicability. With these objectives in mind, Johnson Controls conducted thorough research to identify the key competencies that are crucial for achieving successful performance across all seller roles.

While the competencies and the behaviors formed the base of the framework, the execution was done through:

1. Competency Development Assessment
2. Sales Competency Upskilling Program

The process started when a seller took the **Competency Development Assessment**. It is a systematic self-evaluation process used to measure the proficiency of sales professionals on the core competencies. The assessment identified strengths and areas of improvement for each seller. The assessment results were analyzed and followed by training and development efforts under the **Sales Competency Upskilling Program**.



The program was initially launched in March 2023 and was made available in **11 languages** (English, French, Spanish, German, Portuguese, Chinese, Japanese, Italian, Korean, Thai, and Turkish) **to over 8000 sales representatives** globally.

What sets the Sales Competency Framework apart is its dual role in fostering communication between sellers and their managers and igniting discussions about long-term career growth opportunities. Additionally, it ensured that future hiring decisions align with all the core competencies, thereby establishing standardized competency expectations across the entire organization. Adding the requisite competencies to the IDP also ensured that it remained on the top of mind for the seller and their manager across the year.

To support these goals, the Learning and Development (L&D) team launched learning pathways to support each competency. The pathways provided self-paced learning opportunities for sellers to support their development. Each pathway included:

- Self-paced lesson(s)
- Job aids
- Tips from high-performing sellers
- Practice/action items
- Articles and references
- Additional resources
- Live facilitated session (optional)

Developmental assessment is not a one-time activity; hence, the sellers can take advantage of the evaluation whenever they want to measure their progress against competencies.

Design of the Program

The crux of this program and its major challenge revolved around the design of two essential components that would guarantee its effectiveness:

1. **Designing a framework to help sellers identify the specific skills they need to improve.** In general, understanding skills and competencies and making discussions around them become very subjective.



2. **Establishing a seamless system through which skills could be measured, and upskilling initiatives be undertaken.** One common characteristic of human nature is that we often struggle to maintain objectivity when it comes to things that we cannot measure or quantify.

Following the principles of design thinking, Johnson Controls started by understanding the challenges, needs, and preferences of its sellers. Focus groups were created across different regions of the organization, and with different seller types to collect insights. Based on the inputs, insights, and discussions, it was clear that the program must have the following components:

- A **Sales Competency Framework** that would clearly define the competencies, skills, and observable behavior of the sellers. This formed the crux of the program and clarified which competencies and skills were required to excel in the role and how could these skills be observed or measured in real life.
- A **Sales Competency Assessment** that would help the sellers identify areas to work on as well as showcase skill development in the later stage.
- **Training** to bridge the skill gaps and build sales competency.

Sales Competency Framework

The company partnered with researchers and sales leaders to identify the most impactful behaviors for their salesforce. Johnson Controls also utilized ‘Sales DNA,’ a proprietary, online diagnostic survey to gather deep insights into the skills, intrinsic, motivation, and culture of front-line sellers, how they spend their time, how their managers coach, and what drives top performers, by role, seniority, and business unit. Based on these inputs, the Sales Competency Framework was developed.

During the development process, Johnson Controls considered its Enterprise Leadership Competencies and mapped them accordingly. This alignment led to the creation of a unified Johnson Controls Sales Competency Framework, serving as a straightforward and effective tool for sellers and sales managers alike.

Sales Competency Assessment

In the second stage, Johnson Controls needed a tool through which sellers could identify their current competency levels. Subsequently, the Sales Competency Assessment was developed. It was a self-assessment tool to evaluate a seller's proficiency across the competencies outlined in the Sales Competency Framework.



To design the assessment, the company went back to the feedback from focus groups. Several other considerations were made related to the platform, user interface, and data security. The final assessment process was:

Step 1: Individual Contributor:

- Sales Competency Assessment was assigned to the seller on LMS.
- Seller accessed the assessment and rated themselves on various competency statements.
- Their manager was prompted to complete a similar assessment for the seller.

Step 2: Leader (Reporting Manager):

- The leader (reporting manager) took the assessment where they rated the seller.
- Once the assessment was completed, an auto email was sent to the individual contributor and leader for report view.

Step 3: Finalizing the assessment:

- Seller and their manager received the assessment reports and collaborated to calibrate and finalize the ratings.

The objective of the assessment was to identify the top three focus areas for development, add these to the seller's IDP, and channel their training and development efforts to enhance overall sales performance. Special focus was also paid to accessibility and ease of use.

During the design process, one of the main objectives was to ensure that the assessment did not have too many questions. This was challenging as there were fifty-one observable behaviors, which had to be assessed through 20 questions.



Here are a couple of snapshots from the assessment.

The power behind your mission

Johnson Controls

Sales Competencies

- Solution/product knowledge
- Building partnerships
- Business acumen
- Coaching others
- Communication
- Customer orientation
- Decision making
- Influencing with impact
- Negotiation skills
- Problem solving
- Results orientation

Sales Competency Development Assessment

Welcome to the Sales Competency Development Assessment!

Please select your preferred language in the drop down below and click on the arrow to get started.

English

Johnson Controls

Sales Competency Development Assessment

This quick questionnaire can be used to identify your current level of proficiency in the competencies that make for a successful Sales Leader at JCI. Rate each item by clicking on the radio button in the column that corresponds to how often you perform the behavior.

	Never	Seldom	Sometimes	Often	Always
1. Scans the internal and external environment to identify the relationships that should be initiated or improved to achieve business goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Initiates collaborative relationships with targeted stakeholders and potential business partners.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Involves business partners to help make decisions and complete tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Offers a broad organizational perspective that goes beyond the goals of one's immediate business unit or work role.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Demonstrates flexibility when forming and adjusting partnerships to achieve broader goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Offers support, information, and resources to network partners.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Uses economic, financial, market, and industry information to identify trends and anticipates their impact for customers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Integrates economic, financial, market, and industry data from multiple sources to identify critical issues; and assess current business strategies and results of customers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



Sales Competency Upskilling Program

16 web-based courses, 22 videos, and 18 job aids were created under the upskilling program. They covered several topics from the core competencies like business acumen, negotiation skills, communication, decision-making, etc.

A systematic approach was taken to develop the training component of the Sales Competency Program. First, a thorough analysis of the identified competencies and skills was conducted to determine the specific training topics. This involved reviewing industry best practices, conducting market research, and leveraging internal expertise. Based on this analysis, a comprehensive training curriculum was developed. The training materials were designed to be interactive and engaging, utilizing case studies from the company.

By enabling sellers to own their development with the manager's support, and providing tools to do so, Johnson Controls aimed to foster a culture of continuous improvement and personal growth. The opt-in approach of the program allowed sellers to choose their preferred learning path. With a combination of self-paced modules and live facilitation, the program ensured a comprehensive and interactive learning experience for sellers.

Accessibility has always been given the utmost importance while creating this program. To facilitate easy access to the course, it was hosted on the Johnson Controls learning experience platform. Also, the company wanted to provide all the tools for development to sellers. As a result, the solution contains additional elements as below:

Skill Intro Course introduced a course and mentioned why was the specific skill important for the role of seller.	Knowledge Sessions cover the core learning and best practices. These sessions took a deep dive into the skills and provided important frameworks, models, and best practices.	Actions provide opportunities for sellers to apply their skills in a controlled environment.	Quick Reference Guides were specifically designed to help sellers on the ground.	Best Practices were imparted through sessions specifically focusing on the "how" part of the skill.
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Delivery of the Program

To ensure each element of the program was effectively rolled out, a 3-stage approach was taken. These three stages included:

1. Communication Plan
2. Delivery of Sales Competency Assessment
3. Delivery of Sales Competency Upskilling Program

Communication Plan:

Significant efforts were made during the delivery phase to generate awareness and ensure effective communication of the Sales Competency Program. Various strategies were employed to reach out to sellers and provide them with all the necessary information. This included targeted email campaigns, where detailed program information, objectives, and benefits were communicated.

In addition, the program was highlighted and discussed in relevant Human Resource meetings to create visibility and garner support. To further enhance engagement and buy-in, sales leaders were actively involved in the development process, providing input and insights. Building advocates for the program within the sales team proved instrumental in encouraging participation and reinforcing the importance of skill development.

Regular updates, progress reports, and success stories were shared to keep the sellers informed and motivated throughout the program implementation.

Delivery of Sales Competency Assessment:

The Sales Competency Assessment was deployed and delivered through the company's LMS. The step-by-step delivery process is mentioned below:

- During the launch, sellers received an intimation email requesting them to complete a self-assessment by a specific date.
- The email contained a personalized link to the assessment.
- The seller could take the assessment in the language of their choice.
- The assessment was in MCQ format, promoting ease of taking assessment.
- Sellers were allowed to change their answers/save drafts until they clicked submit.
- To manage and secure the responses of over 8000 sellers, the answers were stored via Power Apps.



- Once a seller completed the self-assessment, the manager was prompted to evaluate the seller.
- The manager’s dashboard showed the list of people reporting to them and reports for those who have completed the assessment.
- Once the manager completed their assessment, they collaborated with the seller to identify the gaps and plan of action.

Here is a sample of the assessment report.

Sales Competency Development Assessment

Johnson Controls

Thank you for completing the assessment. Please see below an exhaustive report of the scores. Kindly save this for future reference.
[Competency details can be accessed from here.](#)

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Competency	Self Assessment	Manager Assessment
Building Partnerships	4.33	4.00
Business Acumen	3.20	3.20
Coaching Others	4.67	4.00
Communication	4.80	4.00
Customer Orientation	4.20	4.80
Decision Making	3.83	3.33
Influencing with Impact	4.00	3.00
Negotiation Skills	4.20	3.60

Delivery of Sales Competency Upskilling Program:

The learning pathways developed for each competency as a part of the Competency Upskilling Program were also deployed on the LMS and were chosen by the seller depending on the area of improvement identified. This blended learning pathway enabled the learners/sellers to learn at their own pace or engage in meaningful and targeted conversations with a facilitator. These learning pathways were first launched in North America and then successfully translated into 11 languages.



Measurable Benefits

The program yielded several benefits. While some of these benefits can directly be measured, others are more qualitative.

Measurable Benefits

- The Sales Competency Assessment program reached 1000 sellers in the first 3 months and 3000 sellers (~38% adoption) by the end of the year, showcasing its adoption and scalability capabilities.
- Implementing the program internally saved the organization \$30,000 by avoiding the need for a third-party assessment vendor.
- Approximately 1000 users have actively participated in the program, investing around 750 hours in upskilling initiatives.
- The program allows sellers to objectively identify their areas of development.

Within the first 3 months, the program **reached 1000 sellers**. Within a year, this number has grown to **3000 sellers**. This significant uptake has translated into tangible benefits for the organization, resulting in an impressive **cost saving of \$30,000** that would have otherwise been incurred if the company had chosen to engage a third-party assessment vendor. By implementing the Sales Competency Assessment internally, the organization has not only saved a considerable amount of money but also gained greater control and flexibility over the assessment process. This internal approach allows for customization and tailoring of the assessment to meet the specific needs and goals of the company and its salesforce.

Moreover, the adoption of the Sales Competency Assessment has gone beyond mere participation, as approximately **1000 users** have already embarked on their development journey through the program. This demonstrates a strong commitment to personal growth and improvement of the salesforce. Collectively, these sellers have invested around **750 hours in various forms of upskilling initiatives** offered within the program. Considering that participation in the program is optional, Johnson Controls views this level of engagement as a clear success.

Other Benefits (Qualitative):

Some of the other benefits of the Sales Competency Program are:

- **Improved Collaboration:** The program promoted discussions between the seller and their managers. This ensured proper expectation management



between the seller and their manager. It also allowed them to collaborate on important questions related to performance and development.

- **Increased Employee Engagement:** The program positively impacted employee engagement by providing skill development opportunities, setting clear expectations, offering personal growth opportunities, recognizing, and rewarding achievements, providing performance feedback, and coaching, and aligning individual goals with organizational objectives.
- **Cost Saving:** The cost of sales training in general can be quite high. Traditional training, although effective, tends to be a recurring expense. Moreover, there are opportunity costs associated with designing, executing, and monitoring recurring sales competency training for a large salesforce spread across 150 countries. However, the Sales Competency Program offered a solution by providing a globally applicable and scalable framework that is digital, resulting in significant savings in the training budget.

By making the program optional, the organization has been able to allocate resources more efficiently and effectively, focusing on employees who are motivated and eager to improve their sales performance. This targeted approach ensured that the investment in training was maximized, yielding better results.

Furthermore, the design of the Sales Competency Program as a blended learning approach contributed to cost savings. Blended learning combines various methods such as online modules, virtual training sessions, and self-paced learning materials. This design allowed employees to access training and development resources remotely and at their convenience, eliminating the need for expensive classroom setups and facilitator-led sessions. This not only reduced costs but also increased flexibility and accessibility for employees, leading to higher engagement and retention of the training material.

Overall, the Sales Competency Program offered a cost-effective solution to sales training by providing a globally applicable, scalable, and optional framework that utilized blended learning methods. These factors resulted in direct savings in the training budget while also enhancing employee engagement and performance.

- **Nuanced Skill Development Discussion:** Skill development discussions can be challenging due to a lack of understanding about competencies, the specific skills that form them, and how these skills can be demonstrated.



This often leads to managers struggling to provide constructive feedback by pinpointing the specific skills their team members need to work on.

Fortunately, the Sales Competency Program provided a framework that brought nuance to skill development discussions. Sellers now had a clear understanding of the skills they needed to develop, while managers had a defined set of behaviors to monitor. This clarity and objectivity made skill discussions more effective and objective, facilitating meaningful growth and improvement.

- **Expansion of the Program:** One of the most significant benefits of the Sales Competency Program is its successful conceptualization and subsequent extrapolation to other business units within the organization. This achievement has led to the development of Competency programs for the **Pricing and HR departments**, representing a major milestone in the organization's growth and improvement. By leveraging the success of the Sales Competency Program and extending its principles to Pricing and HR, the organization is poised to achieve significant improvements in these areas.

The Pricing program consists of **11 core Competencies**, which cover both functional and leadership aspects.

Additionally, the program includes **24 Pricing Specific Skills**, which encompass both technical and non-technical skills required for effective pricing management. These skills range from data analysis and pricing strategy development to negotiation and relationship management.

Similarly, in the HR space, Johnson Controls has benchmarked leading organizations to identify the capabilities (skills, knowledge, behaviors) that are important to successful performance across all HR roles. As a follow-up action, the **HRBP Capability and Preference Assessment**, based on 14 such competencies, has been rolled out to the HR employees.

Overall

The Sales Competency Program at the broadest level constitutes:

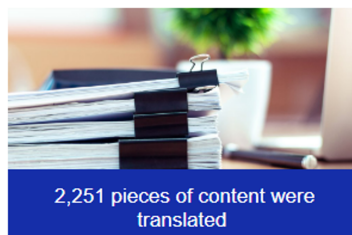
- Sales Competency Framework
- Sales Competency Development Assessment
- Sales Competency Upskilling Program



The Sales Competency Framework and Sales Competency Development Assessment serve as valuable tools for both managers and sellers to identify development opportunities within the sales team. These tools provided a structured framework for assessing the current skills and competencies of sellers and identifying areas for improvement. Working together, managers and sellers could identify three specific areas of focus to add to the seller's Individual Development Plan (IDP). This collaborative approach ensured that the development plan was aligned with the needs and goals of both the seller and the organization.

Managers play a crucial role in supporting the development process through coaching conversations and providing guidance, feedback, and resources. Additionally, sellers have access to self-paced development opportunities through the Competency-Based Upskilling for Sellers pathways. These pathways enabled sellers to enhance their skills and competencies at their own pace, accessing relevant resources and materials to support their growth. By utilizing these tools and resources, managers and sellers can effectively identify development opportunities and create targeted plans to enhance sales performance and success.

The below snapshot shows the key highlights of this program.



The concept and approach are being reused to develop other competency programs to ensure cost-effectiveness and efficient use of time and effort.

In a rapidly changing sales landscape, organizations must prioritize the continuous evolution of such programs to remain relevant and effective. Hence, Johnson Controls aims to regularly review and update the program's content and materials to reflect changes in customer behavior, market trends, and emerging sales



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technologies. By doing so, the organization will ensure that participants are equipped with the latest skills, knowledge, and strategies needed to navigate the evolving sales environment.



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