

Sales course design using experiential learning principles and Bloom's taxonomy

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ABSTRACT

Practitioner concerns and the changing educational marketplace are pressuring colleges to provide more skills based learning. Among the newer skill based areas of study that is greatly in demand is professional sales. In this paper, two courses in a successful professional sales program are examined through the lenses of experiential learning theory and Bloom's taxonomy of educational objectives. Experiential learning theory posits that cycles of experience and reflection can create greater levels of understanding and skills. Bloom's taxonomy provides a sequence of increasingly comprehensive and complex levels of learning. These two frameworks are conceptually combined to show how experiential learning cycles can incrementally move students to higher levels of learning. The exercises and activities in the professional sales courses support and illustrate this important concept and show how tangible, marketable skills can be developed in a classroom setting.

Keywords: Experiential Learning, Sales Training, Sales Curriculum, Bloom's taxonomy

INTRODUCTION

Skills-oriented disciplines are best taught with methods that emphasize actively practicing the skills in situations and with exercises that approximate the way the skills will be deployed on the job. For many years practitioners have used role plays, exercises, simulations, coaching and other active techniques to train professionals in skills-oriented disciplines. Academic institutions, occasionally use such techniques, but more often rely on traditional methods of teaching and learning which do not allow for the development of tangible skills. As a result students intellectually know about the tasks at hand, but cannot physically do them.

Professional sales is a skills-based discipline that is in high demand by industry. Academic programs are beginning to recognize the need for including sales in their curricula. As academic programs embrace the discipline of sales as important part of their programs, it becomes advantageous to bridge the gap between how skills are developed in the industry and in the classroom. In this paper, an approach to developing such courses based on understanding of experiential learning theory and inspired by Bloom's taxonomy is discussed. This can be done by applying the principles of experiential learning and Bloom's taxonomy to design courses and/or programs that meets the needs of both, academic institutions and practitioners. Two courses from a professional sales program, 'professional selling and 'negotiation', are used as examples.

SALES PROGRAMS

Until recently, sales education was not a significant part of business school curricula. If sales was addressed at all it was represented as one or two courses, usually electives within marketing programs. However over the last decade, partially due to the demand from the industry, interest in sales education at the university level has increased greatly. By 2004, over 20% of AACSB-accredited schools included sales as part of their core curriculum (Leisen, Tippins & Lilly 2004). More recently, the field has progressed to the point where entire curricula are devoted to it. The University Sales Education Foundation found 26 school had a sales program in 2008 (as a major, a concentration, or other similar denotation), a tally that almost doubled to 48 in 2010 (University Sales Education Foundation, 2010).

The differentiating characteristic of sales is that it is an applied discipline, in which skills are particularly important. Practitioners have expressed dissatisfaction regarding what they perceive to be the gap between the skills they would like to see in graduates and the skills the graduates actually possess (Leisen et.al., 2004). As such, sales programs in universities are responding to external stakeholder demand.

EXPERIENTIAL LEARNING

Experiential learning theory is a holistic model of learning defined as "the process whereby knowledge ... results from the combination of grasping and transforming experience" (Kolb, 1984). The theory suggests that learning occurs via two complementary phases, grasping the experience and transforming the experience. Each phase has two dialectically opposite modes. Grasping the experience involves abstract conceptualization and concrete experience. Transforming the experience involves reflective observation and active experimentation. The phases and modes of experiential learning can be found in Table 1 (Appendix). Experiential learning crystallizes informal learning patterns into unified structures (Yeo, 2007). Learning

occurs as students repeatedly cycle through the sequence of modes (Kolb & Kolb, 2005) as depicted in Figure 1 (Appendix).

Experiential learning is grounded in six basic principles: 1). Learning is a process; 2). “All learning is relearning”, that is, new learning occurs when students integrate their prior understanding with the new material; 3). Learning occurs as the resolution of conflicts between reflection and action, and between feeling and thinking; 4). Learning is a “holistic process of adaptation to the world”; 5) Learning occurs as existing concepts dialectically interact with new experiences; 6). Learning involves creating knowledge rather than transmitting it. (Kolb & Kolb, 2005). It provides students with what some scholars call “personalized education” and has been shown to improve learning outcomes (Waldeck, 2007).

Experiential learning is rooted in hands-on practical exercises and experiences, which making it similar to the kind of learning that goes on in industry. While more passive methods work in achieving the “what”, the knowledge and understanding related objectives, experiential learning has been shown to be an invaluable tool of teaching the “how”, in the context of fields as diverse as medical care (Batalden and Davidoff, 2007), court-connected mediation programs (Raines, Hedeem & Barton, 2010), library information science (Kazmer & Burnett, 2010), journalism (Steel, Carmichael, Holmes, Kinse & Sanders, 2007) and many others. It has been shown particularly effective in teaching skills needed by the management students (Hoover, Giambatista, Sorenson, & Bommer, 2010; Devasagayam & Taran, 2009; Whetten, 2007). Since sales is a field that is skill-based, experiential learning is the key to student success (Corbett, Kezim, & Stewart, 2010).

BLOOM’S TAXONOMY

Bloom’s taxonomy of learning objectives was originally developed to assist teachers and curriculum designers by providing a systematic assessment tool (Bloom, Engelhart, Furst, Hill & Krathwohl, 1956; Krathwohl, 2002). The taxonomy organizes educational objectives into six major groups in increasing order of student’s grasp of the material: knowledge, comprehension, application, analysis, synthesis, and evaluation. This taxonomy has been found useful not only for purposes of evaluation, but more importantly, designing courses and curricula (Christopher et. al., 2004; Noble, 2004; Chyung, & Stepich, 2003; Foote, 1998;). For practical purposes of instructional design, the objectives are oftentimes grouped into three groups: low level - knowledge or understanding - that emphasizes memory and basic understanding; medium level - application or analysis - involving the ability to use the material, and high level - synthesis or evaluation - which involves applying the concepts to new areas and developing new idea (Betts, 2008; Christopher, Thomas & Tallent-Runnels, 2004). Table 2 (Appendix) shows the three level practical adaptation of Bloom’s original six level taxonomy.

The instructional technology currently available to course designers and instructors allows for new ways of teaching. Specifically, learning objectives that fall into the low level of Bloom’s taxonomy can be move from the physical classroom, leaving contact hours for developing higher levels of thinking (Betts, 2008.) For example, traditionally the textbook and supplemental assignments are read outside of the classroom, however using new technology the basic course materials can be tested online, freeing class time for other activities. The middle level lends itself best to the classroom doing exercises and engaged in group discussion. The higher levels of learning can once again be offloaded from the classroom as research projects or practical group application experiences. However in some skill-based courses, the classroom can

still be used in conjunction with technology and creative, active approaches to teach and learn at the synthesis and evaluation levels.

SALES COURSE DESIGN USING EXPERIENTIAL LEARNING AND BLOOM'S TAXONOMY

Universities are reacting to the demands of employers and the changing educational marketplace by concentrating more on active skills development and less on passive learning of theoretical ideas. Concurrent with this trend is an increase in the number of professional sales programs being offered. Sales is an applied discipline where skills development is a key determinate of career success. It is for this reason that practitioners have traditionally taken it upon themselves to train their sales force. For universities to prepare students for careers in sales it is advisable that they take approaches where students can significantly develop these skills before entering the work force. University students, unlike their corporate counterparts, lack the basic knowledge of key sales concepts. As students move upward from the lower levels of Bloom's taxonomy where they master basic knowledge, they are at a point where skills development can begin. Whereas traditional classroom approaches foster the continued development of primarily abstract conceptual understanding, experiential learning theory provides a philosophy and techniques to transition to a path where they also can development practical skills.

Sales training in industry has used experiential approaches for many years. Usually the participants have some basic knowledge of the field comparable to the lower levels of Bloom's taxonomy. They need to develop practical skills beyond their declarative knowledge. At William Paterson University, the Russ Berrie Institute (RBI) serves both the practitioner and university communities by providing sales training to industrial partners and sales courses to students. Although other schools offer sales programs of various kinds (concentrations, certificates, minors), RBI is the only school that grants a Bachelor of Science in Professional Sales. The Institute uses the same basic training methods for professionals and students. The student's academic work and professional preparation culminate in the 'Sales Challenge' - an annual national competition organized by the RBI. During the Sales Challenge Week, students compete with other students in 1) a 15 minute sales call opposite a trained sales professional, 2) 2-minute "self-pitch" attempting to get hired by an industry representative; and 3) an "in-basket" exercise in which they allocate their time between various tasks a sales person faces during a typical day. Students also get to participate in a variety of workshops conducted by sales executives and sales faculty. After each role play, students watch and critique their performance.

After the sequence of sales classes, students should ideally become salespeople who possess these skills:

1. They are good listeners, not good talkers.
2. They don't present the product or service until they uncover the needs.
3. They never begin the sales call with a presentation because that establishes one way communication. Rather they begin with dialogue to establish a consultative approach.
4. They present only those features and benefits that relate to the prospect's needs.
5. They don't try to close until it appears that the needs have been met.
6. They don't treat resistance as an objection to be "overcome." Rather they see it as a series of questions or concerns that must be answered.
7. They believe that the client relationship begins rather than ends with the sale.

8. They set their goals beyond being a salesperson toward being a continuing resource for the client.

These are all skills that can be taught and learned, but they all require significant practice. An experiential learning approach can be used to design courses, establish exercises and activities and provide mechanisms for students to progressively build the skills.

Professional Selling and Negotiations are two courses required in the RBI Professional Sales curriculum that have equivalent professional training programs. Professional selling is of paramount importance to practitioners and among the most highly sought after skill sets (Leisen et.al., 2004). Negotiation is a practical tool for “progressive movement toward a desired end”, and classes teaching it oftentimes fulfill students “pragmatic and career-related” goals (Salacuse, 2010). In the following section, the key skills areas and the methods for developing them are explored and examined through the lens of experiential learning and Bloom’s taxonomy..

PROFESSIONAL SELLING AND NEGOTIATIONS COURSES

According to the catalogue description the Professional Selling course “Introduces the basic concepts and skills of professional selling, including customer analysis, communication skills, effective openings and closings, and customer relations. Selling skills and concepts are developed through the extensive use of sales exercises, role-plays and presentations.”

The Negotiations course “Explores the basic concepts and key critical skills involved in between the organizational representative and the client, including the psychology of bargaining. Applies negotiation strategies and tactics in a variety of business environments, with an emphasis on collaborative and competitive styles of negotiating. Seminar-style course with multiple bargaining simulations throughout the semester.” Both courses are highly participative and require attendance in order to receive full learning benefit. The syllabi state: “If you are not here – you cannot learn through the interactive exercises.”

Selling is presented to students as “being buyer/client-oriented, about taking the time to listen to the potential buyer and ask questions to uncover needs at all levels—product needs, tastes, attitudes, and feelings.” Attention is focused on mastering critical behaviors and honing critical selling skills. Six particular selling skills that the course is trying to instill in the students are:

1. Initiating contact in the office, on the telephone, company or prospect initiated, networking, social events, cold call, referral, etc.;
2. Questioning to develop information relevant to the prospect / client's needs;
3. Effective listening to demonstrate understanding of the prospect’s issues or needs;
4. Responding with benefits and offering solutions and recommendations that meet the identified needs of the prospect;
5. Resolving objections, differences, or problems;
6. Closing on commitments to do business with you or proceed with a specific sales process step.

Negotiations is based on an understanding of sales negotiation as a conference rather than confrontation aimed at fulfilling common concern rather than "selfish demand," advocating cooperation and win-win approach. The course applies negotiation strategies and tactics in a variety of business environments; emphasis on collaborative and competitive styles of negotiating. It is a seminar-style course with multiple bargaining simulations throughout the semester.

The students progress through Bloom's taxonomy, fulfilling the lower levels (knowledge, understanding) through course readings, lectures and in class discussions. Students must know and understand the material in order to participate in more advanced class discussions and activities. The lower levels of learning are assessed by means of quizzes. The quizzes make up 10-20% of the course grade, reflecting the notion that the basic levels are necessary prerequisites but not the emphasis of the course.

The major part of the course is spent in hands-on application exercises and subsequent reflective inquiry. One primary method are the role plays, some of which are digitally recorded. The experience is greatly enhanced by the superior learning space and equipment. RBI's sales lab is equipped with realistically configured office spaces with multiple cameras and one way mirrors that allow for multiple points of unobtrusive real-time observation and video recording for later review.

After each activity, students are expected to reflect upon their experiences and write a self-critique of what transpired in the process. It is made clear to the students that this self-critique submission must not be an event summary but a true self-reflection. The syllabus states: "Do not write a narration of the process, the intent is to offer a critical analysis of the encounters. Thus, writing how everything was terrific or horrible is not only folly, but displays poor analytical skills. Your write up should offer richness, honesty, soul searching, and a savage introspection of yourself and how you performed. The format of the paper is already set, you have four areas to address, and should label them verbatim in your paper. Final note, people tend to slack off when addressing parts 3 & 4, do not make this mistake:

- 1) What did you do right?
- 2) What did you do wrong?
- 3) What did you learn from your role play and interview?
- 4) What are your specific action items for personal improvement?"

As the semester continues, the role plays and exercises become more challenging and the students' skills continue to grow. The progression of role plays and exercises prepare the student for the 'Sales Challenge', designed to provide a unique, active test of their new found skills. This iterative process that culminates in the Sales Challenge is a direct application of experiential learning theory. The students go through many cycles of concrete experience-reflective observation-abstract conceptualization-active experimentation as they do role play after role play. Each cycle moves them higher on Bloom's taxonomy of educational objectives. See Table 3 (Appendix).

Students are expected to dress professionally and act as professional salespeople would, creating real experiential learning immersion. The curriculum allows for integration of courses and skills, for example students in the sales class play sales people opposite to the buyers played by the students from the negotiations class.

Additionally, the courses require a general reflection paper. In the negotiations class, it involves recording and analyzing the student's current approach to negotiation and conflict management, critiquing it and formulating strategies for further development. In this way, the course emphasizes building negotiation strategy rooted in the understanding of students' own preferred negotiation style in its interaction with the styles of others. In the professional selling course, the final paper is a comprehensive reflection on the 'Sales Challenge' addressing every component skill and phase of the process. This final assignment is the last iteration of the experiential learning cycle and places the student near or at the top of Bloom's hierarchy

Feedback from students reveals that they appreciate the opportunities for the growth that the hands-on experience of the role plays combined with the reflective observation of the videotapes of the role plays provide:

“I think I cried when I had to do my first video recorded role play. I made lots of mistakes and could see them and how they hurt me. Better to learn in role plays than on the job.”

“It is scary when I compare my first role plays to my senior sales calls and presentations. I’ve come a long way baby! Don’t show those early videos.”

“It’s hard to imagine how much money I’ve wasted or didn’t make because I didn’t negotiate well – or didn’t negotiate at all.”

“It was amazing how much negotiating changed the deal when we took time to figure out what the other team wanted. Before that we just argued and were deadlocked.”

“The handling objections skill is great. There are so many conflict situations I have been able to deal with better now.”

CONCLUSIONS

As practitioner demand and changes in the educational marketplace put pressure on academic business programs to provide more tangible skills, experiential approaches will be utilized more and more. Experiential learning theory can be used in designing courses to achieve the full spectrum of objectives found in Bloom’s taxonomy of educational objectives in a skills based discipline (Kolb, 1984; Bloom, 1956). Hands-on activities become a valuable learning tool when accompanied by follow-up assignments designed to encourage reflection and analysis.

Professional sales, a relative newcomer to college curricula, is a skills based area that greatly relies on experiential approaches. In this paper two courses from a contemporary sales program are examined. The courses are based on existing sales training programs used in practitioner settings. The exercises and activities are shown to follow the established cycle of experiential learning - concrete experience-reflective observation-abstract conceptualization-active experimentation. The paper also brings in Bloom’s taxonomy of educational objectives and shows how repeated iterations of the experiential learning cycle incrementally move students up the taxonomy.

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APPENDIX

Table 1. Phases and Modes of Experiential Learning

| | | |
|----------------------|----------------------------|---|
| Grasping Reality | Abstract Conceptualization | Thinking, formulating of ideas |
| | Concrete Experience | Experiencing through senses |
| Transforming Reality | Active Experimentation | Acting, “hands-on” testing of ideas |
| | Reflective Observation | Reflecting on the experiences and actions |

(from Kolb & Kolb, 2005)

Table 2. Levels of Thinking – Adaptation of Bloom’s Taxonomy

| | | |
|--------------|----------------------------|--|
| Low level | Knowledge or Understanding | Behaviors that emphasize recall or memory or indicate a literal understanding |
| Medium level | Application or Analysis | Behaviors that require students to use what they have learned in a new way or that break down knowledge into its component parts |
| High level | Synthesis or Evaluation | Behaviors that combine elements of learning into a new whole or that assess the value of particular ideas or solutions |

(from Betts, 2008; adapted from Christopher, Thomas & Tallent-Runnels, 2004)

Table 3. Mapping of Selected Course Components Onto the Phases and Modes of Experiential Learning and the Levels of Bloom's Taxonomy

| | Grasping Experience | | Transforming Experience | |
|------------------------------------|---|---|--|---|
| | Concrete Experience | Abstract Conceptualization | Reflective Observation | Active Experimentation |
| Knowledge and Understanding | (Past Experience) | Course Readings, Lectures | Homework, Quizzes | n/a |
| Application and Analysis | In-Class Exercises, Early Role Plays | Class Discussions, Early Role Play Debriefings | Role Play Write-Up | In-Class Exercises, Early Role Plays |
| Synthesis and Evaluation | Later Role Plays, Sales Challenge participation | Later Role Play Debriefings, Sales Challenge Feedback | Advanced Role Play Write-Up; Term Paper (Based on Sales Challenge) | Later Role Plays, Sales Challenge participation |

Figure 1. Cyclical Sequence of Experiential Learning

