

Transforming a global sales culture

A case study about how a consultative sales process was introduced across a global sales force.



Opportunity

Caterpillar® and Cat® dealers use data from technology-equipped machines to provide more insights into customers' equipment and operations. Cat Connect, the commercial offering for digital services, gives customers visibility into the performance of their fleets and businesses, as well as empowers them to make smart decisions.

But, dealer sales teams were used to selling iron. Cat Connect requires them to understand customers' needs, recommend solutions, and prove ROI—a process they haven't done before.

Solution

ThoughtForm created a two-day instructor-led training course with clear language, visual explanations, and interactive adult learning techniques to help Caterpillar teach dealer salespeople how to use a consultative selling approach with customers. In deploying the course, Caterpillar brings consistency and accountability to the way Cat Connect is sold around the world.

How did we help?

- Developed an intuitive, four-step consultative selling process that is applicable across industry segments.
- Brought clarity to ideas and concepts related to consultative selling.
- Designed interactive exercises for participants so they could learn by doing.
- Built a course workbook with takeaways for participants to use as a template as they apply what they learned to real customer scenarios.
- Developed a complete toolkit for the course that includes all materials needed to facilitate the course.
- Conducted course pilots with internal teams and dealers to refine the content and exercises before global deployment.
- Suggested methods for keeping learners accountable for what they learn.



The consultative sales process has been ingrained in our team here and seems to be working wonders. We're actually getting traction and signing contracts.

Scott Leslie
Technology Solutions Manager
at Ransome (Cat Dealership)



What did we do?



Developed a simple consultative sales process.

To create a solid foundation for salespeople to build from, ThoughtForm created a clear, four-step sales process that could become more robust over time and easily transfer to future offerings. The content of the course applied to multiple industries across Caterpillar's global footprint and helped Caterpillar to rollout a consultative selling approach across its dealer network. Most importantly, the sales process was intuitive enough that it could easily become a part of salespeople's daily operations.



Designed interactive exercises that help salespeople practice what they learn.

Once the sales process was defined, ThoughtForm created a series of engaging exercises and activities that helped Cat dealers' salespeople learn by doing. The exercises helped the training participants spend most of their time role-playing lifelike client scenarios with their peers, rather than simply imagining what a real-world application of the sales process would entail. Participants used the exercises to focus on collaboration, one of the "soft skills" that is essential in consultative selling.



Packaged the course as a complete kit.

Finally, ThoughtForm compiled the sales process and exercises into an engaging and complete kit of parts for trainers to use to deliver the course. Anyone with some training experience can use the presentation and exercise materials to facilitate the course without in depth guidance or instruction. The kit was consistent, but adaptable. The core process within the kit is industry-agnostic, so it can be used by any salesperson. The examples and exercises are industry-specific so that it's applicable and relevant to each individuals' area of focus.

Who did we help?

Caterpillar—building the jobsite brand.

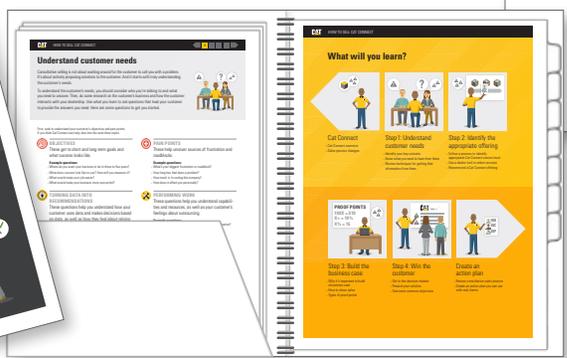
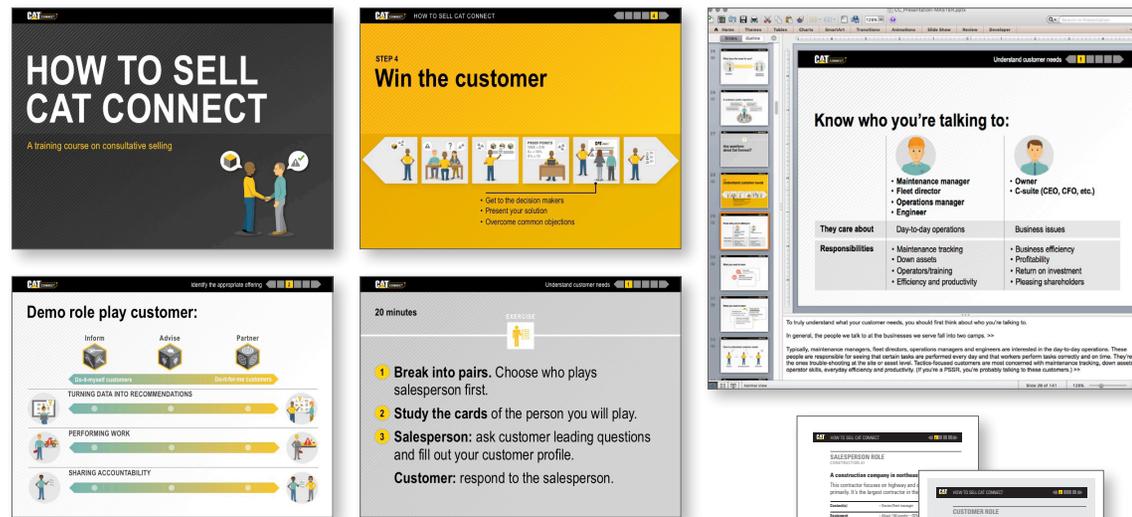
Caterpillar Inc. is the world's leading manufacturer of construction and mining equipment, diesel and natural gas engines, industrial gas turbines, and diesel-electric locomotives. The Cat brand is the cornerstone of the Caterpillar portfolio, representing products and services for customers working in Construction, Resource, and Energy & Transportation industries. Caterpillar relies on a distribution network of more than 220 Cat dealers in over 180 countries.

Caterpillar is headquartered in Peoria, Illinois, and has regionally-based teams (Distribution Services Divisions) that work directly with Cat dealers to implement corporate strategies that help them improve their operations and grow their businesses.

What did we create?

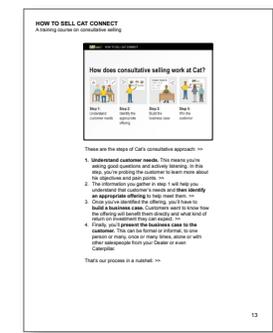
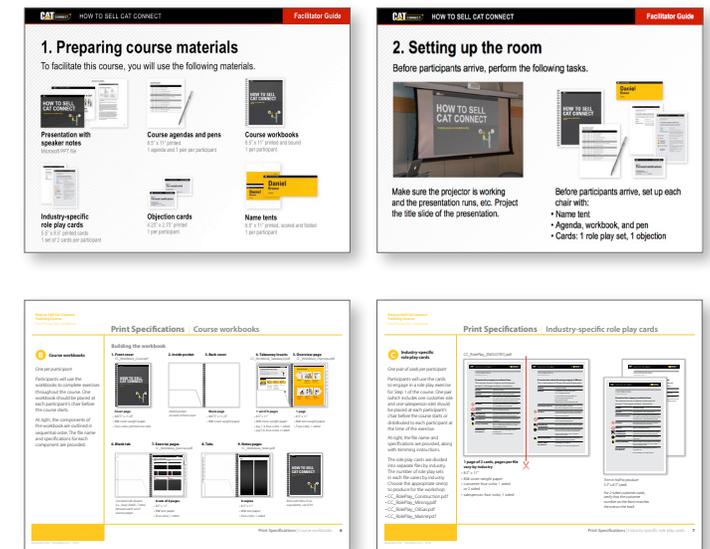
Course Materials

ThoughtForm created a package of course materials that builds on the foundation of the consultative selling process. It includes a detailed presentation with script notes, exercise tools, and a workbook that helped participants apply their learning to real-life client experiences.



Facilitation Tools

To support trainers in delivering an engaging course, ThoughtForm created a suite of facilitation tools that were visual and clear. It includes a guide with instructions for facilitation, script notes, a production guide for printing course materials, and a one-page overview of the course to attract participants.

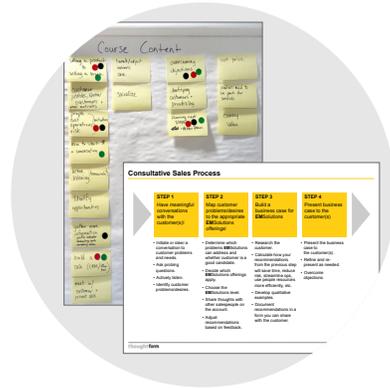


How did we do it?

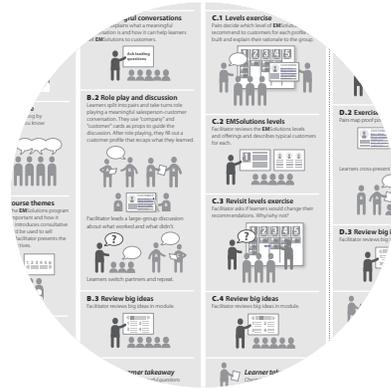
To ensure alignment, ThoughtForm and Caterpillar used a highly collaborative, iterative, and agile process.



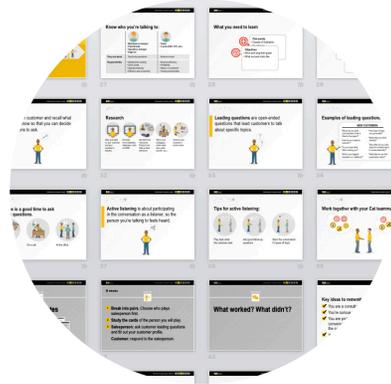
Facilitated a workshop with project stakeholders to develop personas, review sales scenarios, identify important topics, and explore the training experience.



Created a simple, four-step consultative sales process for Caterpillar based on interviews with Cat salespeople who successfully sell digital services.



Mapped out the course experience in six modules. Each of the four core modules cover a step of the consultative sales process.



Built course content and designed exercises, including a detailed script with lifelike scenarios to ensure that the course was engaging and meaningful to participants.



Conducted pilots of the course, first internally and then with dealers, to uncover roadblocks and evaluate the effectiveness of the exercises. After each pilot, we made incremental improvements.



Planned the rollout the course, including defining an approach for how to train trainers, creating a thorough facilitator preparation guide, and developing a production guide for easy print fulfillment.

ThoughtForm

ThoughtForm transforms ideas to connect people with actionable information. Working where strategy meets design, we help our clients turn fuzzy ideas, challenges, and opportunities into clear and meaningful messages and experiences. With ThoughtForm you can engage and inspire people, build their understanding, and enable them to take action.

ThoughtForm is a Pittsburgh-based design consultancy focused on visual communications. We work with leadership teams in organizations ranging from Fortune 100 companies to small nonprofits. Let us give your thoughts a visual form with the power to communicate.

To find out how our design solutions can help you contact Steve Frank at:

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To learn more, visit us at:

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