



TOP

50

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## ADDENDUM

- Quota® INTERNATIONAL Contact Coordinates
- Global Training Solutions Inc. Contact Coordinates
- Discount Coupon

## BACKGROUND

Quota® INTERNATIONAL is a market-leading organization dedicated to helping clients improve their salesforce, sales management and executive capabilities. The company was founded in 2004 in Mississauga, Ontario Canada. It is now represented in over 20 countries and has an extensive product line offered in 7 languages.

Over the course of the company's history it has provided training implementations to thousands of professional sales people and worked across most industries. Quota® INTERNATIONAL has also provided educational programs through academic institutions; associations and through custom applications in: Pharmacy; Retail Marketing; Merger & Acquisition and Consumer appliance sales.

There has been once constant over the last 15 years of our existence...that is change! While the core elements of our beliefs have remained consistent, the way in which professional sales are conducted have continued to evolve.

### Quota® INTERNATIONAL BELIEFS

- Training is condensed experience that accelerates new learner's effectiveness
- Sales capability is not reliant on 'born with' intrinsic competencies
- Reinforcement of learning is as important as 'classroom' time
- How programs are delivered have a direct impact on the retention and use of skills
- Sales Managers primary responsibilities are to: Recruit talent; coach talent and retain talent
- Competency training provides the quickest return on investment
- Use of a multi-media delivery approach ensures learners maximize their retention of skills

In response to the changing landscape of how sales professionals work with their clients, Quota® has continually revised and upgraded its content to stay current. For example, the entire Quota® INTERNATIONAL product line (15 programs) has each undergone multiple revisions and upgrades in just 15 years!



However, there have been other, extrinsic, changes that have also changed how market leaders enhance their sales performance.

#### These changes are:

- Use of social media
- Entrance to the workforce of Millennials through to Generation Z
- Level of education of new entrants
- Moore's Law (number of transistors on a chip doubles every year while the costs are halved) ensures technology growth
- Global economy and geo-economic associated issues

## CONTENT

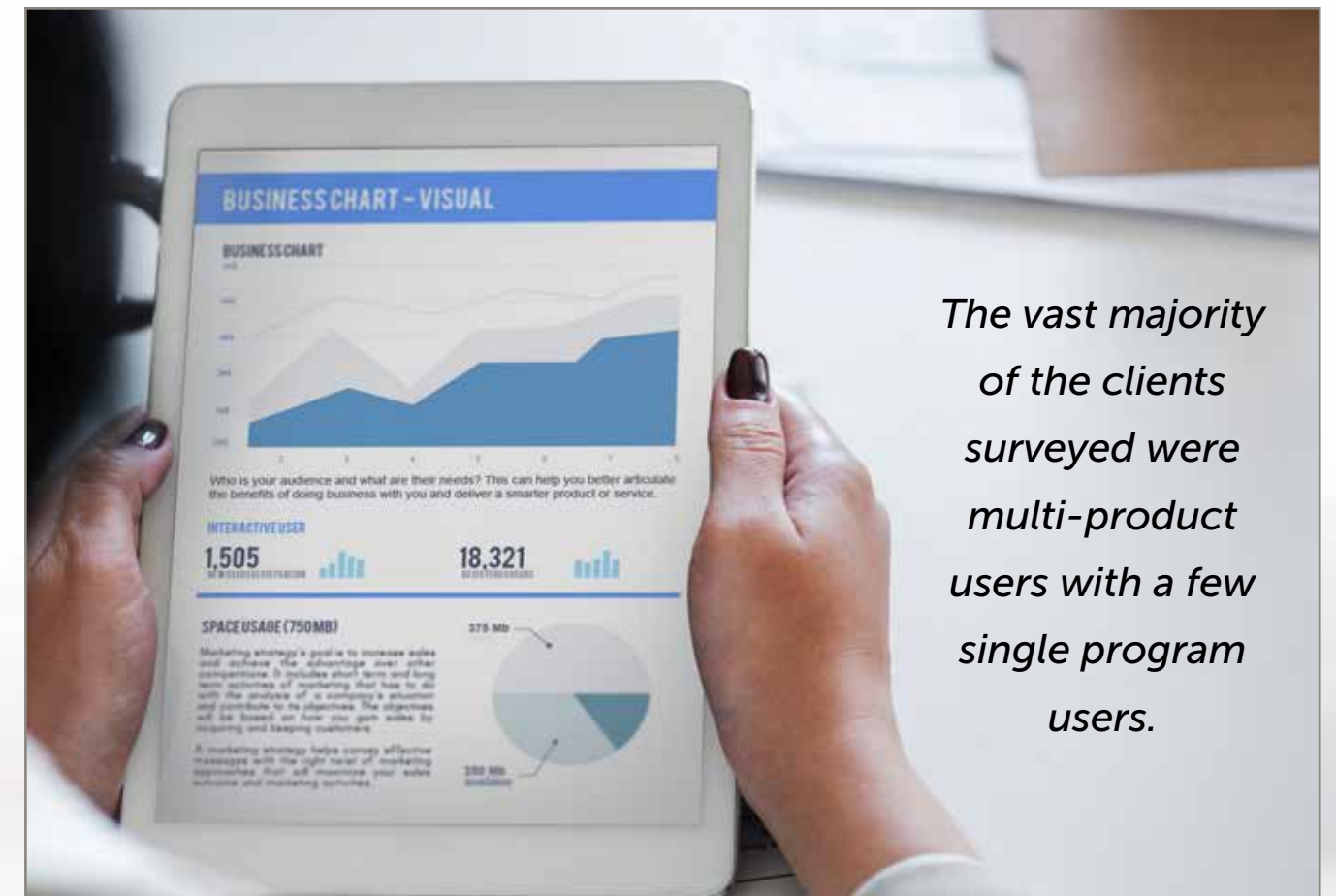
In the context of these changes, Quota® INTERNATIONAL felt it was time to re-evaluate how we were serving our clients and what changes we might need to make to better service them in the next decade.

To ensure an unbiased viewpoint and allow our client base to talk freely, we engaged Global Training Solutions Inc. (see Addendum) to conduct 3<sup>rd</sup> party surveys. Each survey was conducted over the phone at set times and the commitment was to keep the survey to a minimum of 10 minutes.

However, the vast majority of discussions were frequently much longer with the average conversation exceeding 30 minutes. We are very appreciative of the time and passion our clients shared with us and their unbridled feedback on how to make our services even more engaging.

The vast majority of the clients surveyed were multi-product users with a few single program users. Most clients have been Quota® users for many years and typically brought our company in on an annual basis to continue to advance their sales teams effectiveness.

Note: All clients were drawn from our Canada-USA client group. None of the surveys' were conducted with Quota® clients or distributors in our international locations.



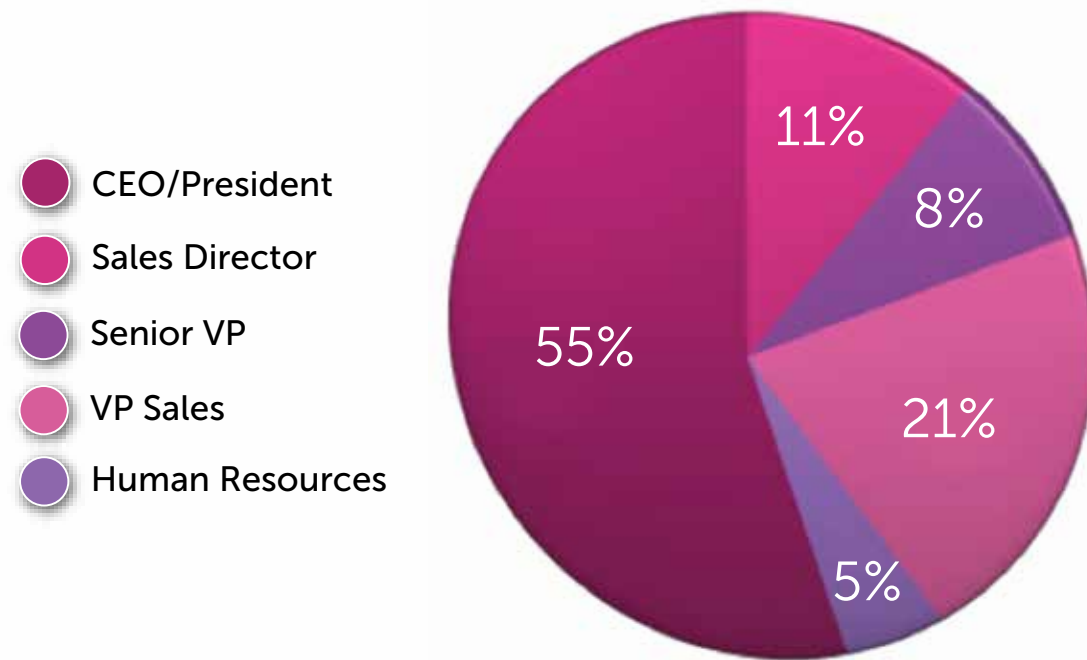
*The vast majority of the clients surveyed were multi-product users with a few single program users.*

# SURVEY GROUP DEMOGRAPHICS

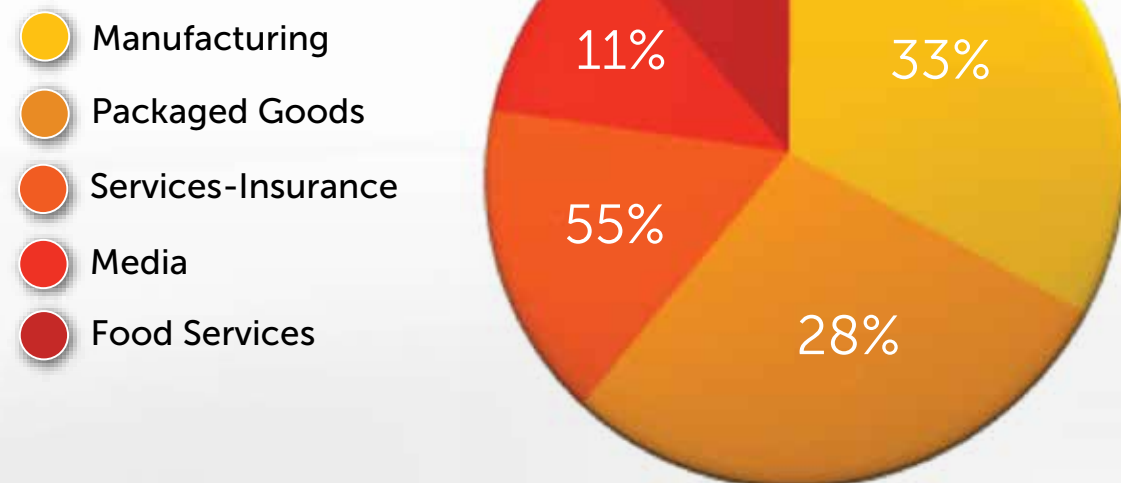
## DEMOGRAPHICS

Quota® clients can be found in multiple industries and across various company sizes. While the company provides services to a number of Fortune 500 companies, the majority of clients can be found in small to medium sized businesses.

Surveyed individuals were primarily sales executives but included CEOs, Sales & Marketing executives and HR/Training professionals.



Responses in this survey were from these industrial categories.

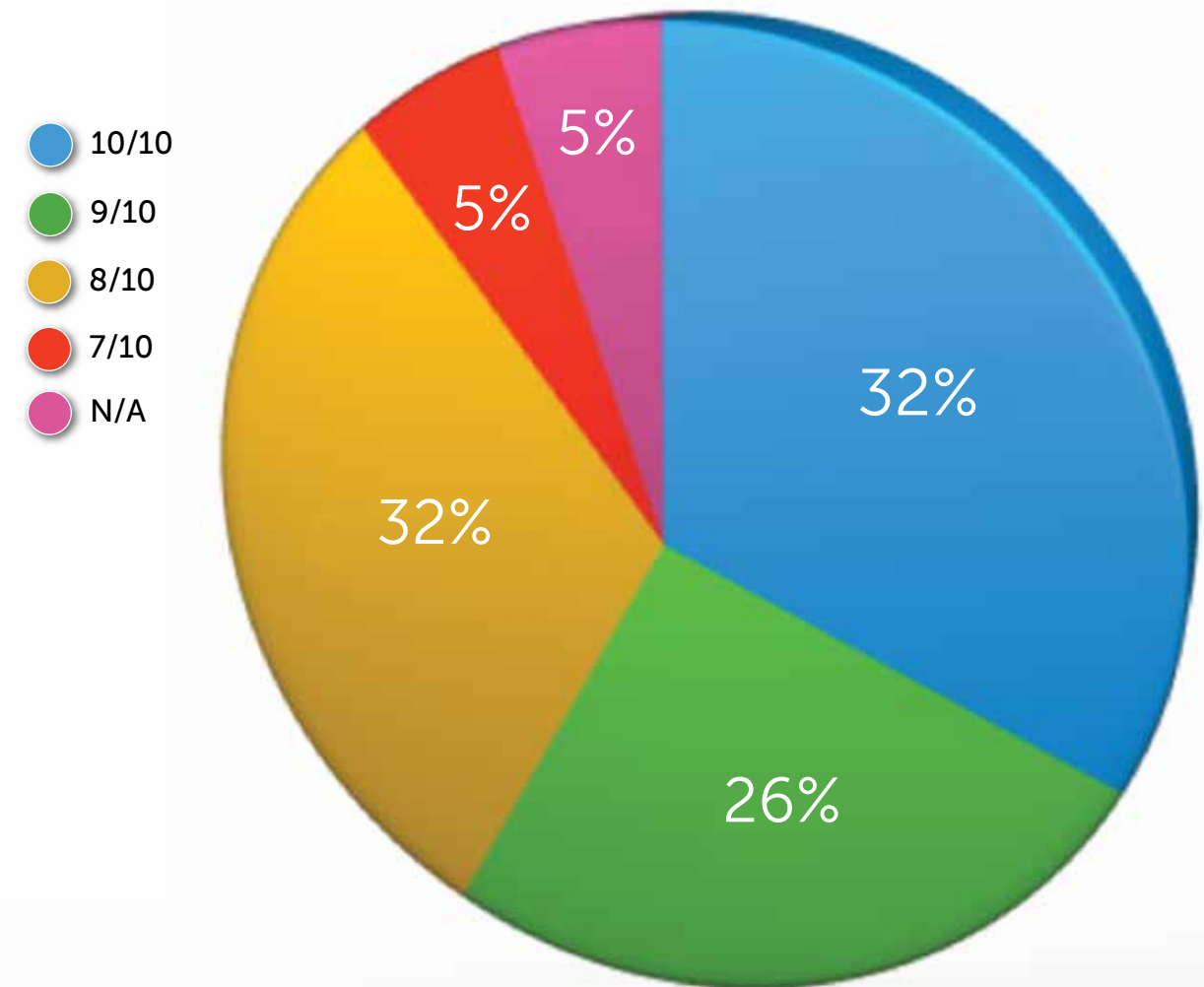


## How would you rate your experience with Quota®?



1

Gratefully, Quota® INTERNATIONAL received no ratings below 7. **Over 90% of respondents rated Quota® between 8-10 on a scale of 10 (10 highest, 1 lowest rating).** Respondents that were newly hired were rated as N/A.



### COMMENTS

"Performance can be dependent on the assigned trainer"  
 "Top rating for delivery but a lower rating for reinforcement. There is a gap to get the training to stick"  
 "Rating is based on both my company and personal experience"



# Have you seen any notable improvement in your team's abilities to perform post Quota® training?

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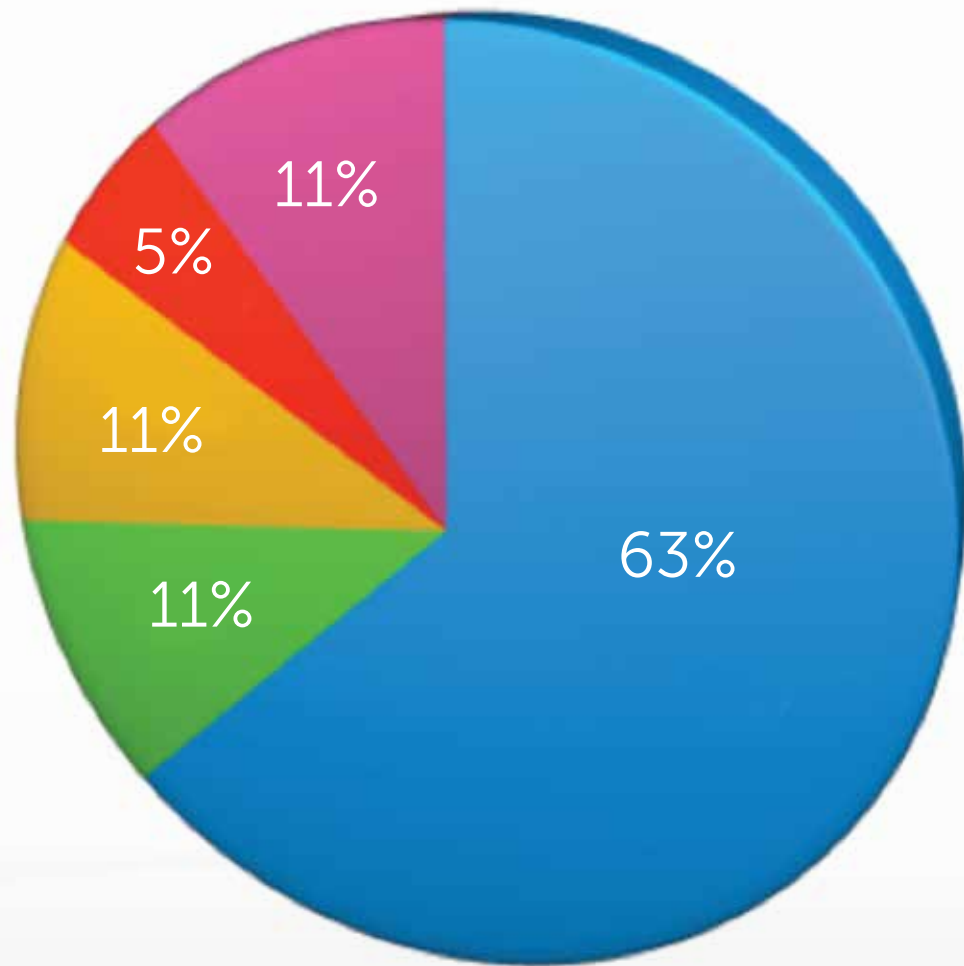
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It's long been understood that training that is interactive has a higher retention rate than non-interactive (sit and listen!). However, we also know that skills acquired in a solid training experience will atrophy if there isn't an ongoing process of reinforcement and coaching.

Survey respondents were particularly sensitive to this need. They provided outstanding feedback on where they see Quota's current capabilities and where the company needs to improve moving forward.

74% of respondents saw large to significant improvement in their team's performance. 10% did not respond as they had not set in place any performance metric analysis or standards.

- Large
- Significant
- Marginal
- Not At All
- Didn't Measure



## COMMENTS

- "This can be hard to measure, particularly with a large team"
- "We have incorporated a number of Quota® principles including R.O.T.I."
- "Getting the training to stick is critical"
- "I blame myself for dropping the ball"
- "Didn't see a huge improvement but felt it was a good investment"
- "Our company is growing 20%/year so we believe it made a difference"

continued 2

## COMMENTS

- "Yes!**  
*Better pipeline growth, better closing, better structure and cohesiveness amongst the team"*
- "Yes!**  
*However, the improvement was temporary. After 6 months the reps returned to old habits"*
- "Absolutely!**  
*We saw a significant improvement in sales and professionalism"*
- "Yes!**  
*Our guys that took the course credited increased their confidence and energy"*
- "Yes!**  
*Especially with the take-home: Q'ube and the Student Workbook"*
- "Yes!**  
*I used the skills learned at the University of Toronto and as a Sales Manager"*
- "Yes!**  
*Everyone is speaking the same language and managing the sales stages"*
- "No (no comments)"**
- "Yes!**  
*People are now approaching how to better plan their key account strategies and using formal approach for their next steps in the sales process"*
- "Yes!**  
*The methodology was exploited successfully"*
- "Feedback was positive from my team - haven't gauged with any metrics"**
- "Saw some improvements, not enormous"**
- "Yes!**  
*People are now approaching how to better plan their key account strategies and using formal approach for their next steps in the sales process"*

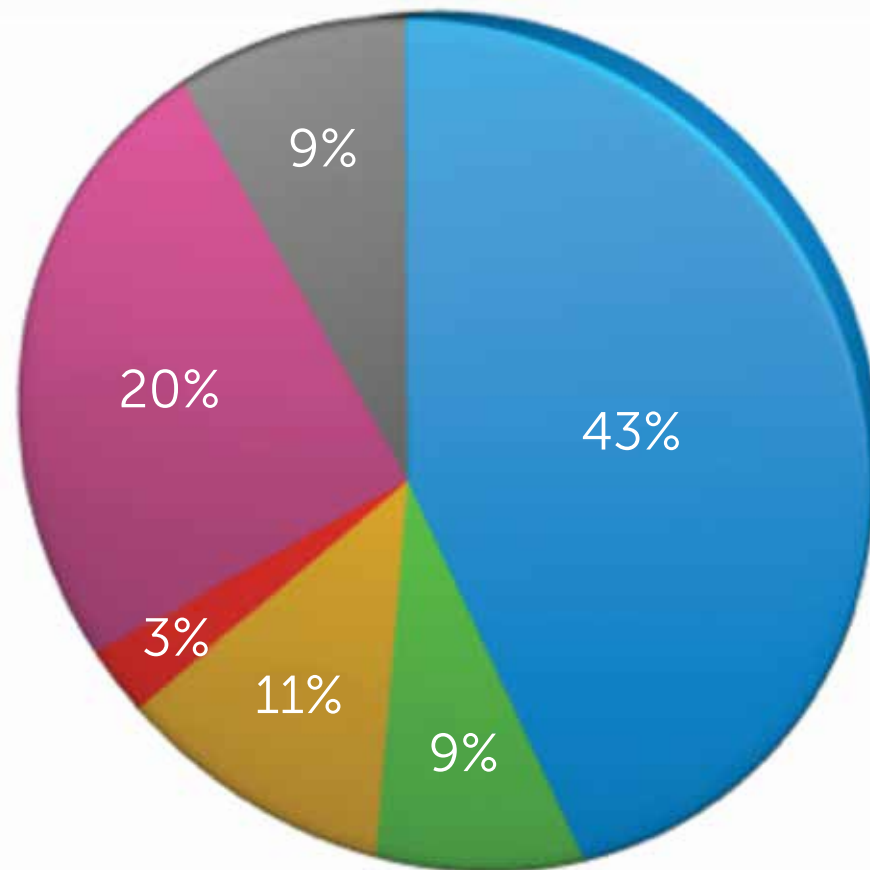
## What areas of expertise did you most value from Quota®?

## What areas of expertise did you most value from Quota®?

3

Naturally client needs vary industry by industry. They also vary dependent on the competency level of their representatives and their years of experience. However, there were consistent responses in 5 major categories:

- Structure/ Process
- Management Development
- Expertise of Instructors
- Quality of Materials
- Content & Gamification
- Can't Recall



43% of respondents identified Structure/Process as critical learnings for their representatives. They often referenced the consistency of sales approach and having a common language amongst their teams.

The actual content (and to a lesser degree the use of gamification as a teaching methodology) also ranked high. The quality (expertise; experience; credibility) of the Quota® INTERNATIONAL instructors was also a key point for many respondents.

Finally, the integration of providing sales executive & sales management development was also seen as an important element of the Quota® experience.

### COMMENTS

- "Some programs are amazing - ex. Quota® COACH™"*
- "Structure, Process, System, Role Playing"*
- "The facilitators are knowledgeable, experienced and have the ability to add real world examples. Capable & credible"*

continued

3

### COMMENTS

- "The training materials are excellent and we love the game approach"*
- "The sales process plus prospecting and needs analysis tools"*
- "Sales process. Plus identifying the steps in the process and having a common lexicon"*
- "The Issue Selling program - skills that take the representative to a higher level!"*
- "Executive level selling skills"*
- "Selling skills - exposure to training that is experiential"*
- "Structure in sales calls and in expectations"*
- "Being able to communicate with all reps on the same page and speaking the same language"*
- "Process/mapping/structured approach"*
- "BIGGEST Value - needing to listen to customer wants (learned in Quota®)"*
- "The instructors, not just teachers. They had lots of experience from the field"*
- "Sales Process and the concept of the Sales Manager as a Coach"*
- "Standardized sales practices. Knowing the stages helped to define what was an opportunity, prospect and actual account"*
- "Gained experience in how to set up training sessions. Work in progress"*
- "Gave us a framework on how to approach sales and steps to close"*

## What areas of support would you like to receive from Quota®?

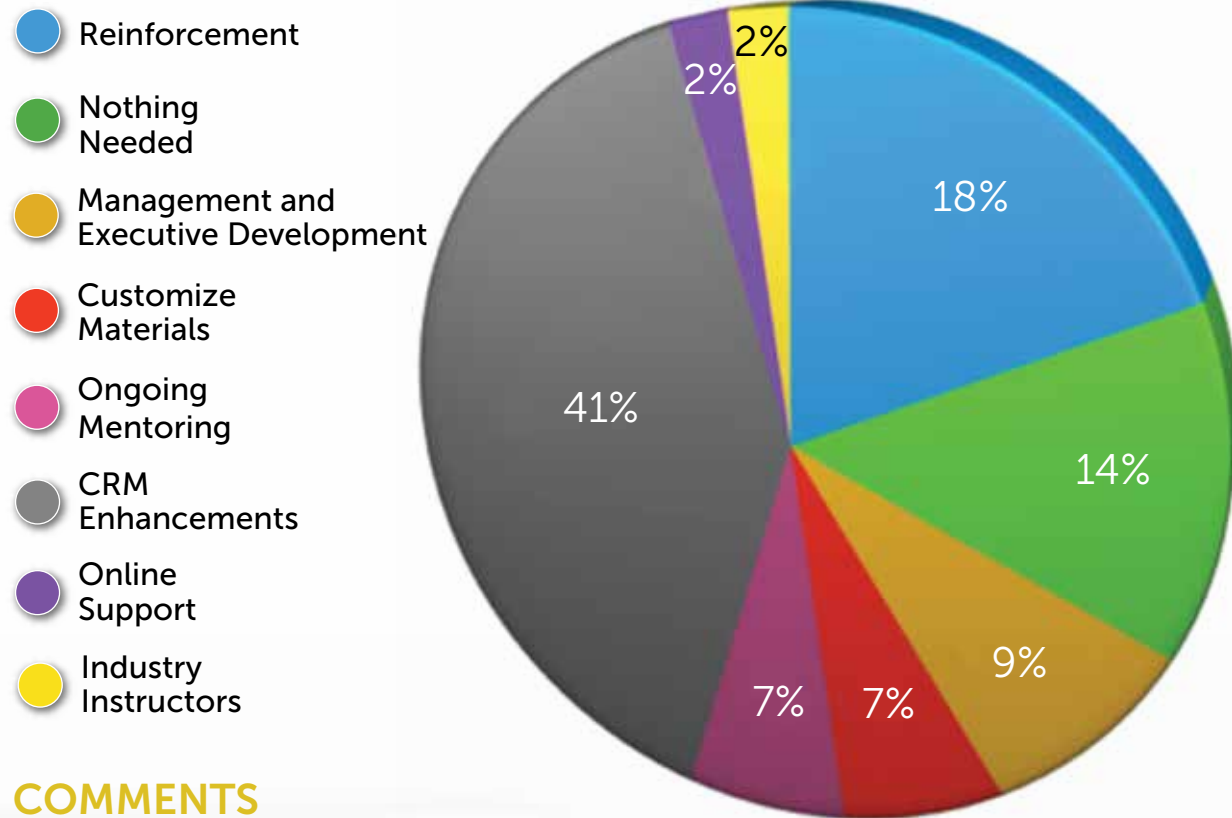
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This client feedback was particularly important to our survey results. As companies adjust to changing market place conditions and technologies, they clearly want Quota® also adjust to how to better support them.

Areas of support were varied but the consistent theme was 'don't love us and leave us!'. Clients highlighted both reinforcement for their representatives and for their managers. They had a high interest in ongoing mentoring and online support.

Finally, moving their programs to more 'custom' or company specific would hold a high appeal.

Editor's note: This is actually a common viewpoint from multi-year clients that want to graduate their content.



### COMMENTS

- "Customize Quota® to our unique 6-step process"
- "Be able to customize/enhance the Quota® CRM™ tool"
- "Reinforcement and onsite Management training"
- "Gap in reinforcement. Technology to better manage the sales process"
- "Ongoing coaching/mentoring program"
- "Leadership camp and online formats such as webinars & elearning"
- "Trainers with industry-specific backgrounds:"
- "None - Quota® does a really good job"
- "Ongoing program/refresher course. Sales people have egos but need shorter refresher courses"
- "The VP Sales does selling too and needs a coaching program!"

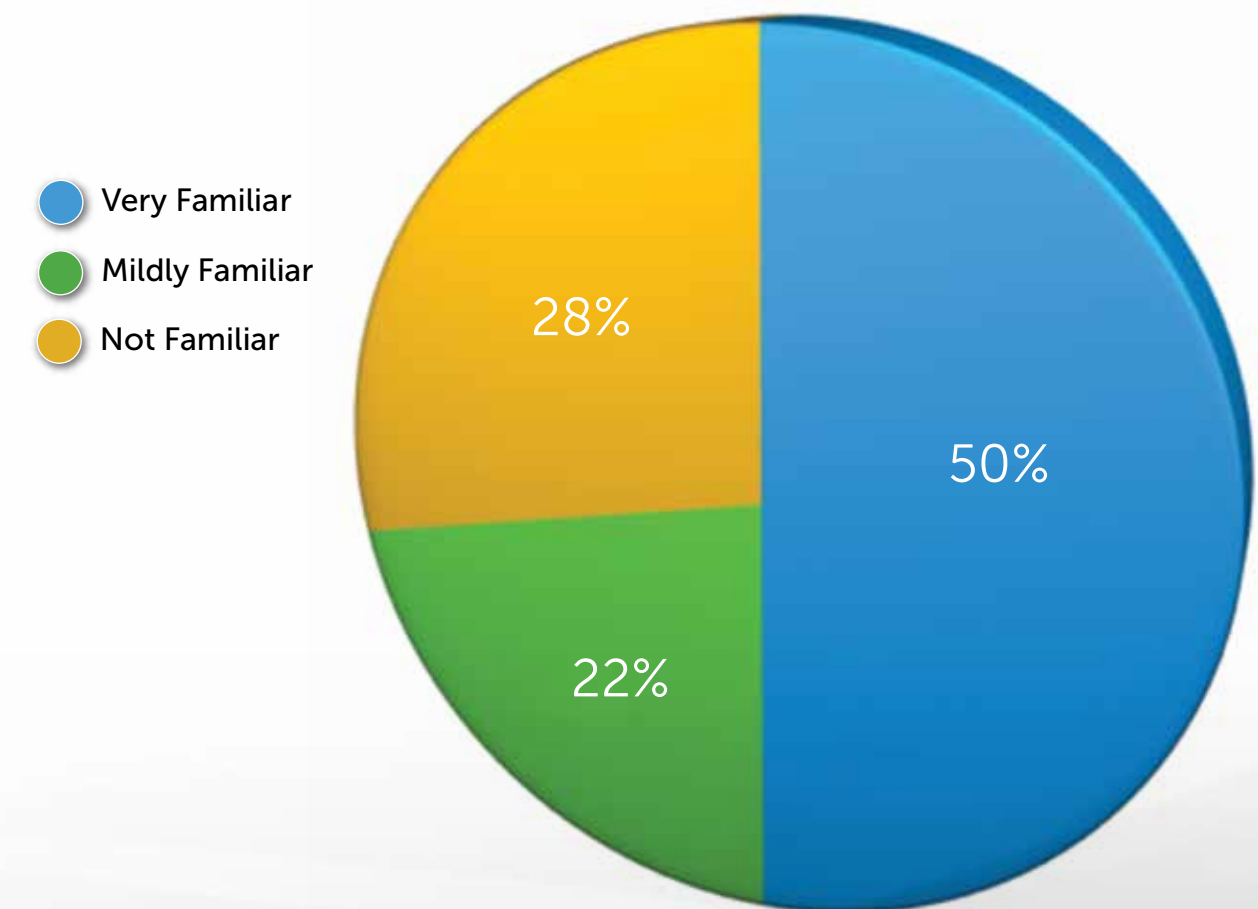
## Are you aware of the complete Quota® System or only the program your team trained in?

5

As the TOP 50 respondents included clients from the earlier stages of Quota® INTERNATIONAL's evolution, not all clients were familiar with the programs introduced in the past 5 years.

Also of interest were the respondents suggestions on new content they would like to see... that has already been introduced to the market. 50% of the respondents felt that they were very familiar with the Quota® family of programs. Most of these respondents have provided the complete family to their representatives/managers so this was expected.

However, in some cases the respondent indicated they were aware of the complete offerings while we know they were not. This responsibility (update and education) falls on Quota® and not the client!



### COMMENTS

- "Very familiar. We send our people to the public seminars and make use of grant \$"
- "We have used all the Quota® programs"
- "We could use an overview"
- "We are aware of the new Quota® Charisma™ program. Our sales manager needs it!"
- "Yes, we are aware of the two new programs: Quota® Charisma™ and Quota® DecisionLab™"



## Are you aware of the Quota® public seminars for new hires?

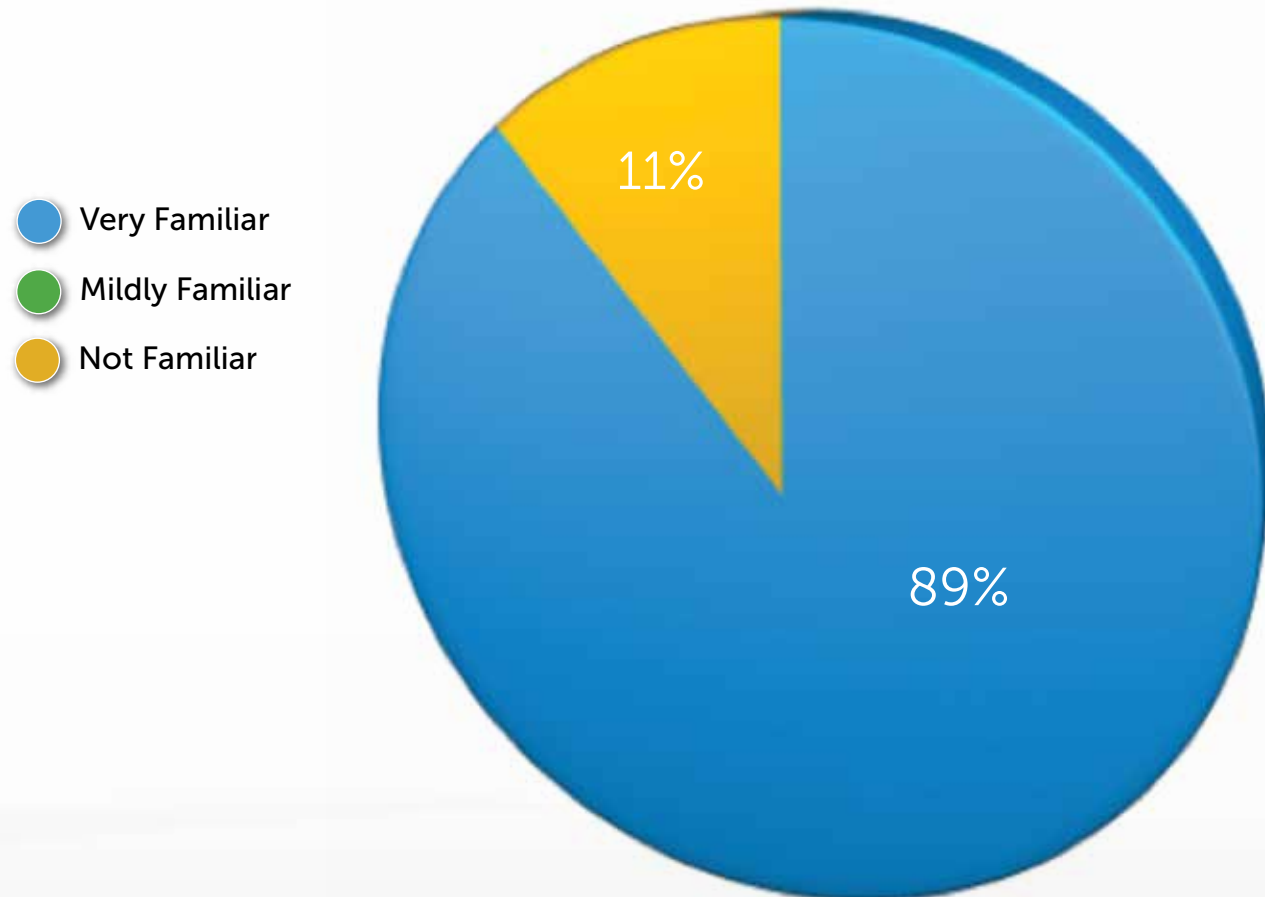
## What could Quota® have done to enhance your experience with the company?

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Respondent's replies were of high importance to Quota® INTERNATIONAL! The company invests in multiple public sessions each year as an 'added value service' to existing Quota® clients. The public seminars are an important way for clients to ensure their new hires quickly get up to speed with both the structure and language that existing representatives and managers use.

For many clients that either experience low turnover, or have small sales forces, the public seminars ensure they can still send one to many new hires without waiting for quorum for a complete private seminar.

Public seminars also provide new hires with the experience of seeing how other representatives, from other industries, apply the Quota® skills to their own selling situations.



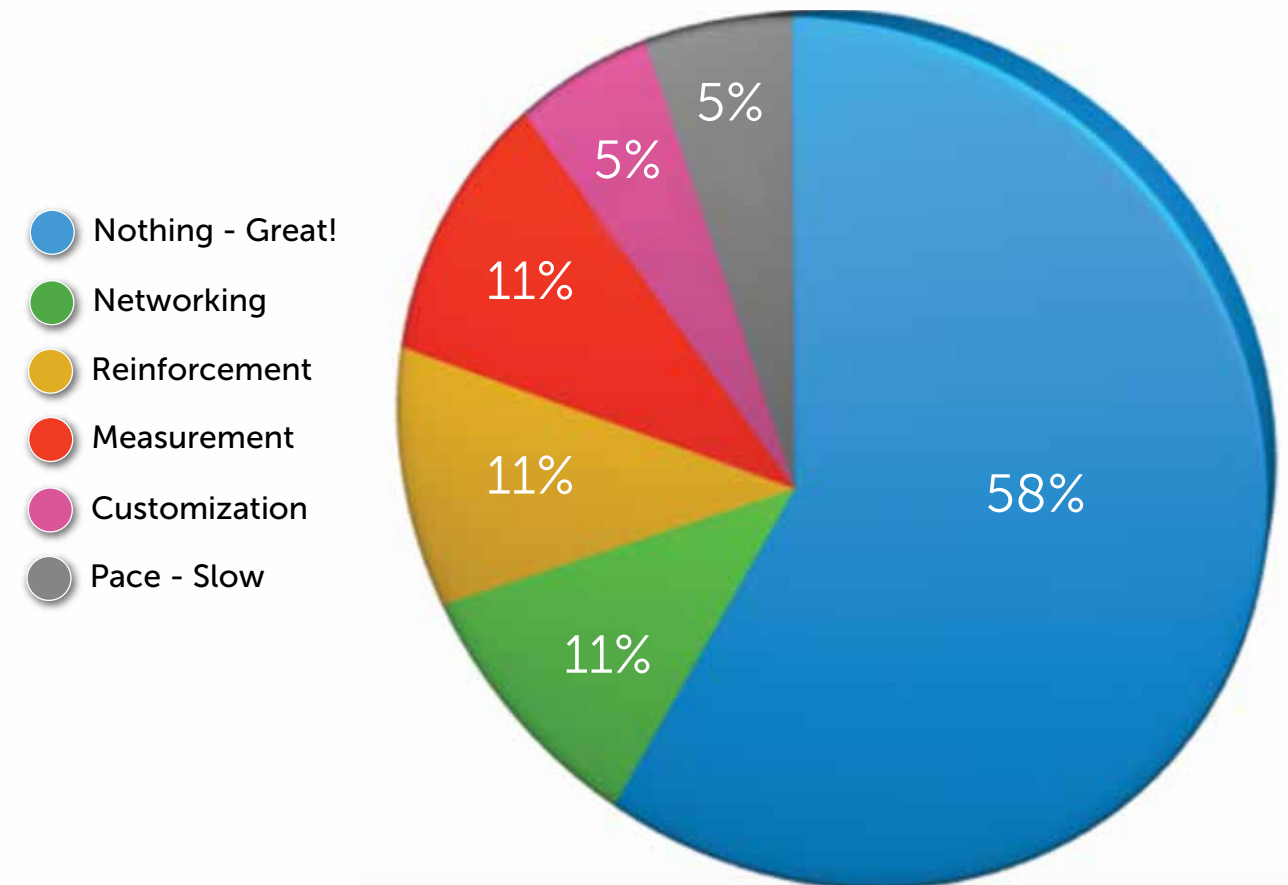
- Very Familiar
- Mildly Familiar
- Not Familiar

### COMMENTS

- "Yes, we send reps and managers"
- "Not really aware"
- "Yes, we have someone going to an upcoming seminar"
- "Yes, we are aware. We have very little turnover so typically only have 1 or 2 people"
- "Yes, we send all new hires to the courses"
- "Yes, we receive 1-3 emails/year with the invitations"
- "No but a good idea. We didn't know that it was ongoing"

7

**Client feedback was overwhelmingly positive.** 58% of respondents replied that they had only positive experiences with Quota® and had no suggestions on how to improve the experience. The remainder of respondents had various suggestions that emphasized the importance of measuring, reinforcing and tracking performance.



- Nothing - Great!
- Networking
- Reinforcement
- Measurement
- Customization
- Pace - Slow

### COMMENTS

- "Overall - Fantastic!"
- "Maybe customization and how to make training stick"
- "Nothing! Great instructors/location/food!"
- "Everything super positive"
- "Check on trainee's feedback. Tools for feedback on both training and field performance"
- "Nothing. All the basics covered. It rests on me to sell upward..."
- "Nothing. It was really what I needed for the team. Perfect"
- "Nothing. Feedback from people taking the course is always positive"
- "Finding a way to spread the word. Better networking"
- "Quota does a good job with participant introductions at the beginning of each course"
- "Went too fast. Need to take the time to learn the business and our client's unique needs"
- "Nothing really as everything was very thorough"
- "Everyone had a great experience with Quota. It was fun and they learned"



## How would you Compare Quota® pricing with others in the marketplace?

## Are you and your team currently receiving the QNEWS™ newsletter?

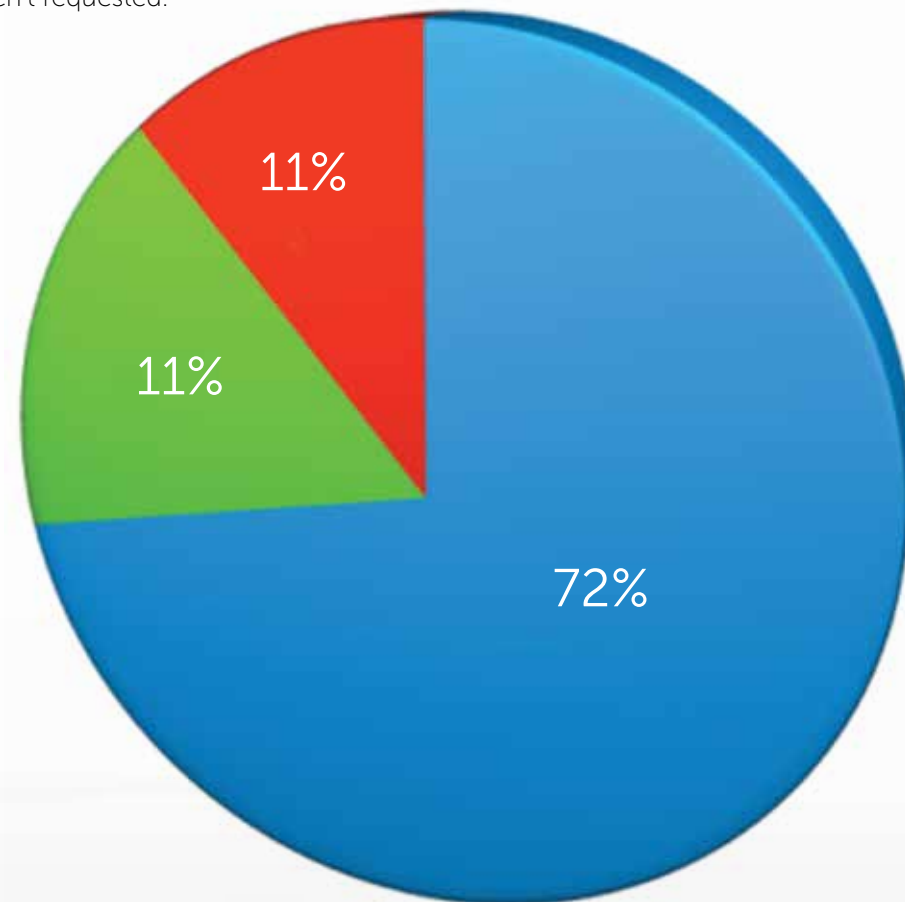
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Retail pricing of quality training has a broad range of fees/structures. Quota® INTERNATIONAL has kept a close eye on what is an acceptable range of fees on a per person basis. Of note is that while North American typically uses the per person/per day fee structure, our international locations typically use a total per diem based on total deliverables.

Our philosophy has always been to position ourselves at below market rate on price but above market in quality. Admittedly this is a subjective perspective, however Quota® can confidently claim that our fees are notably below standard market fees.

Quota® also provides a variety of special discounts (repeat customer; volume; etc.) that further reduce the fees. We also have a number of clients that explicitly stated that they don't bother with competitive pricing due to their loyalty to Quota. This loyalty is very much appreciated and we always endeavour to provide discounts to these clients even when they aren't requested.

- Appropriate
- High
- Low
- Don't Know



### COMMENTS

- "A bit high. Perhaps we could receive a day fee vs. per person?"
- "Quota is well priced and a good value"
- "Fair - we like the per person fee structure"
- "Market priced. We don't shop around as are married to Quota®"
- "Couldn't tell you. I don't shop around. Quota® is it"
- "Smart pricing for all budgets. Public events are reasonable"

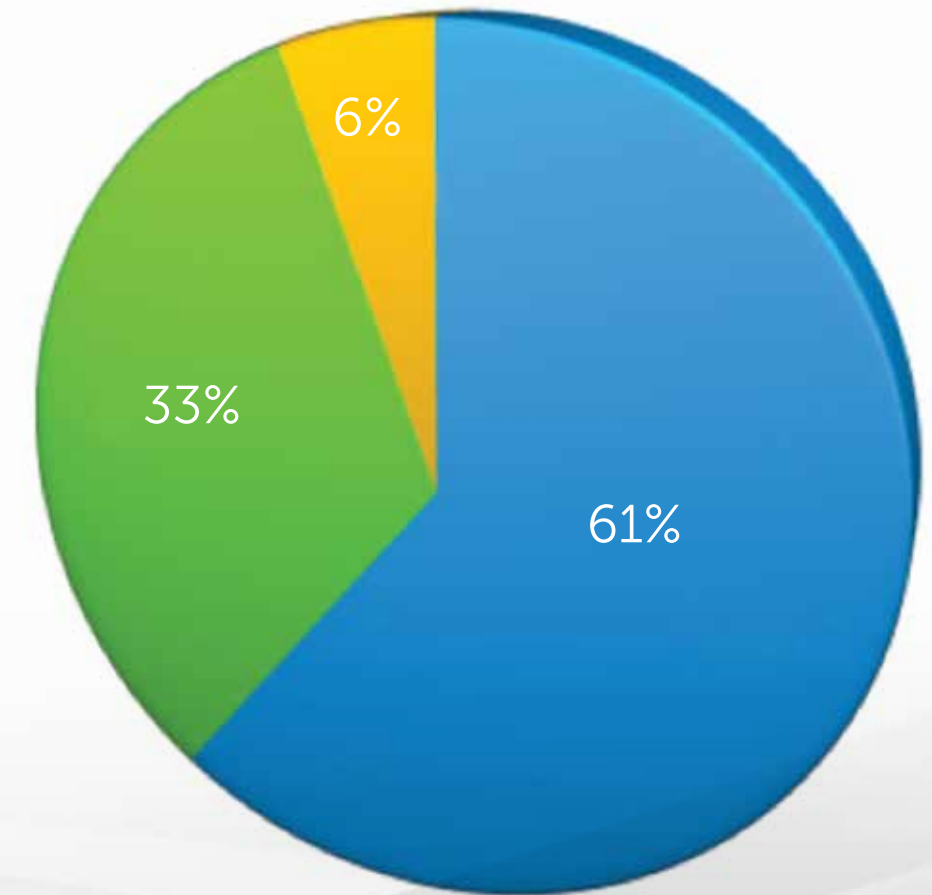
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Quota® INTERNATIONAL produces a monthly newsletter (QNEWS™) that provides a variety of information in each issue:

- Cover letter from Earl Robertson on a current topic
- 2 Articles from global sales 'guru's' on a specific topic
- Photos of recent Quota graduates
- List of upcoming public seminar schedule

The primary purpose of QNEWS™ is to provide ongoing learning & reinforcement to Quota® graduates post-classroom training. 12 issues/year are sent via email to each recipient (with immediate option to delete or unsubscribe). The survey provided some valuable insights from our respondents that is captured below and will be implemented. Of note, the majority of 'No' respondents requested to be re-added to the list.

- Yes
- No
- Don't Know



### COMMENTS

- "Yes...and I read it!"
- "Yes...a bit too long. Maybe shorter and highlight acronyms"
- "Yes. I skim it"
- "No. But don't want to receive it because no time and receive too many emails"

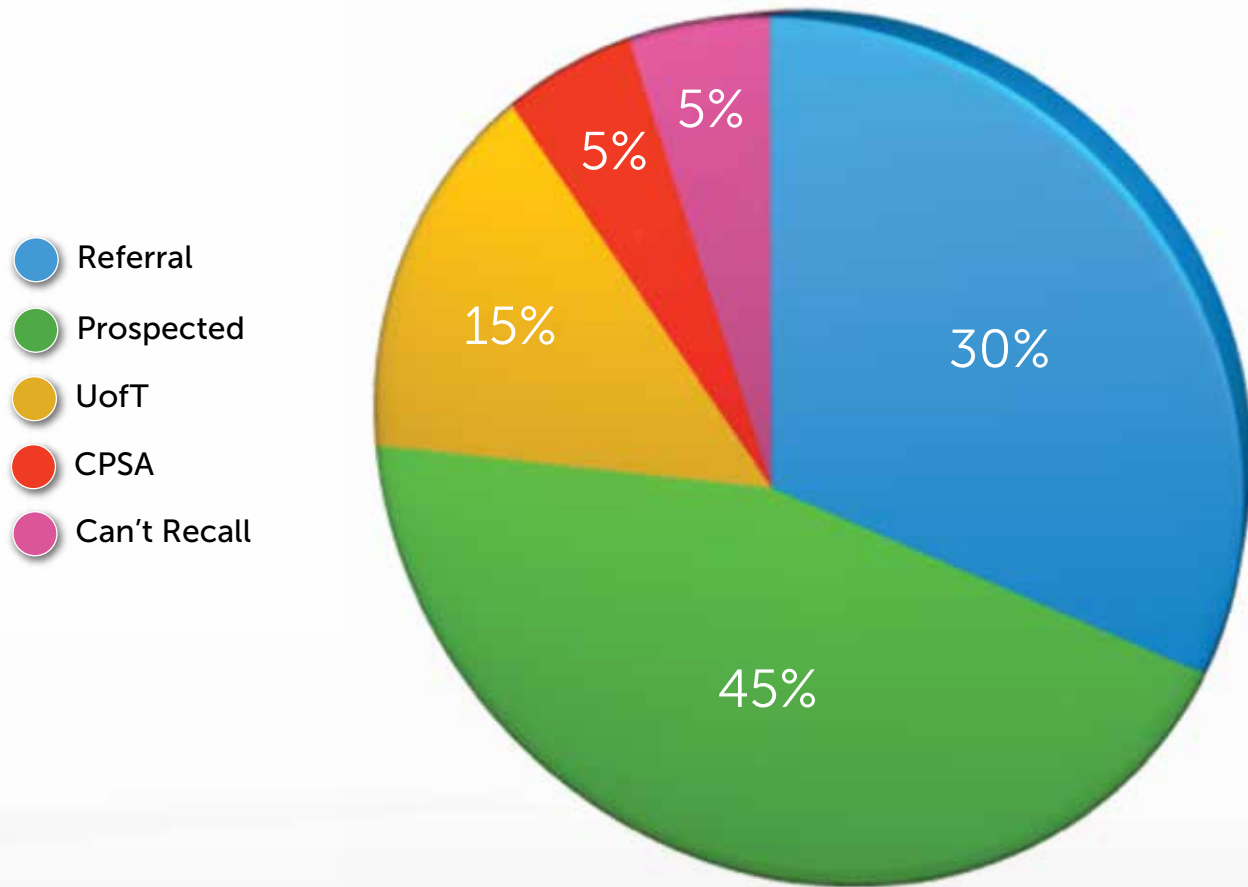
# How did you first learn about Quota® INTERNATIONAL?

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Quota® has traditionally relied on its own prospecting efforts and word-of-mouth referrals. In fact, 75% of respondents fall within these two categories.

We have also stated that we would rather have one 'partner client' than have 'five transaction clients'. Our belief system, and what we preach, is that contemporary sales requires partnership in understanding our client's business environments and how we can best aid them achieve their operational objectives.

Referrals are the life blood of our company and Quota® provides a referral bounty of 5% (of net sale) to any referral-provider.



## COMMENTS

- "Your rep knocked and walked in the front door"
- "Took a free course"
- "Introduced by a mutual friend"
- "We were prospected by Quota®"

## SUMMARY

Quota® has terrific clients! In every case our clients were positive, supportive and offered excellent suggestions on how to improve our services. We are very, very appreciative of the time & feedback and want to explicitly state how important your feedback has been to us and how we intend to implement your suggestions.

To that end, we received LOTS of additional feedback that fell outside the original 10 questions that provided even more insights. **They are captured below:**

"Quota should run a 30-minute webinar on the sales process"

"Great system. All new hires go through Quota. Keep the new programs coming!"

"Its a great system. I recommend that at the end of each course, that a suggestion is made as to what is recommended for the next course in the system"

"Quota is a great program for organizations looking for interactive, simulated training"

"There is a gap between the training and the reinforcement of sales people using what they learned"

"Q NEWS should be 1/2 page long and have just one article"

"Should include some profiling to help identify who are best at what function (hunters/cookers/etc.)"

"Better communication of partnerships Quota has with CPSA and other academic institutions"

"Keep fine-tuning the sales approach as it is constantly changing"

"Can Quota provide online sales training?"

"Keep relevant with social networking skills"

"Add an app that has standard responses to standard questions"

"Create a short, weekly program of follow up learning and reinforcement"

"I can't find current public seminar dates on your website"

"The nature of sales has changed and Quota needs to add in more quantitative follow up"

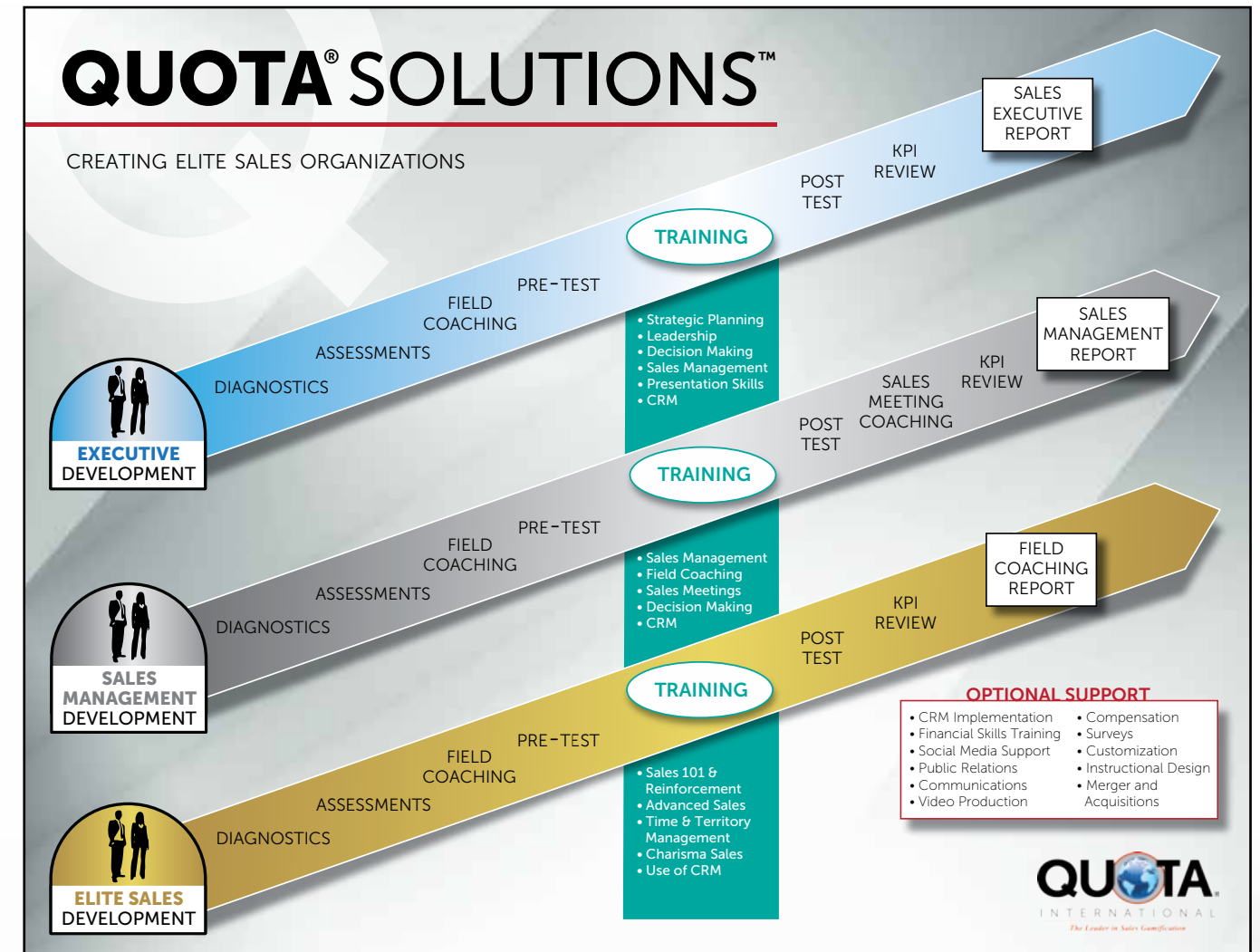
"Option to do a 2-day Quota would be appealing"

The feedback received has had a profound effect on future **Quota® INTERNATIONAL** strategy and operations. As a consequence of the feedback the following processes have been created/implemented:

- A new **Quota® SOLUTIONS™** program has been launched (see diagram on next page). The new program provides a comprehensive solution for any client that truly wants move their sales operation to the industry-leading standard. More information on this will be provided in the near future.
- **Quota® SOLUTIONS™** provides an end-to-end solution that begins with team and individual diagnostics & assessments and includes field observation and coaching. Quantitative analysis of knowledge, skills and behaviours are managed through a process of: defining key performance metrics; pre/post test, field coaching and management development.
- Each level of the sales operation (Representatives; Managers; Executives) receives a summary report of findings, metrics and strategic recommendations.
- **QNEWS™** has been reduced to a single article per issue and highlights the upcoming public seminar schedule.
- Webinars are being planned for 2019
- Partnerships have been established with **LEADERSHIP FUNDAMENTALS** (Oakville, ON) and **SALES LEVERS** (United Kingdom) and **THOMAS INTERNATIONAL** (Oakville, ON) to provide individual elements of the new Quota® SOLUTIONS™ services. Other providers are also in discussion.
- A new partnership has been signed with the **CANADIAN PROFESSIONAL SALES ASSOCIATION** (CPSA) with Quota® INTERNATIONAL as an accredited partner. Clients will now have the option to test (sometimes with Quota®) examiners, for their Certified Sales Associate (CSA), Certified Sales Professional (CSP) and Certified Sales Leader (CSL) designations.
- A new version of Quota® (34th version!) is in production and includes increased material on social selling skills.
- **Quota®** is exploring partnerships with a variety of non-competitive, complimentary providers. These companies provide expertise in unique arenas such as: sales compensation; managing virtual sales teams and online sales training.
- All future training sessions will conclude with communication to management/participants on upcoming public seminars for new hires.
- A return-client discount program will be highlighted in our upcoming **QNEWS™** issue.
- Personal coaching services will be offered via Quota® for interested clients. These services will address all three levels of sales organization (Representatives; Managers; Executives)

The results of this survey and a personalized copy of Mr. Robertson's book **ESSENTIAL SALES - THE 10 STEPS TO SALES SUCCESS** has been shipped to you directly. Per our previous commitment, each respondent received an electronic coupon to put one of their staff through an upcoming workshop at 50% of the market fee. Please quote the coupon **code: Q18CDC** when registering.

Should you be interested in speaking more with Quota® about your upcoming plans, or to engage **GLOBAL TRAINING SOLUTIONS** (Survey provider) coordinates for both companies can be found in the Addendum.





# ADDENDUM

## Quota® INTERNATIONAL CONTACT COORDINATES

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