



Learning strategies of advertising sales people in Montana
by Lyle Arlo Courtnage

A thesis submitted in partial fulfillment of the requirements for the degree of Doctor of Education
Montana State University

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Abstract:

Businesses face many changes in a world dominated by technology, global market forces, and continuous reorganization. Among the most significant of the changes are the new responsibilities sales forces are taking on. In their quest to adopt the marketing concept, organizations are converting their salespeople from order takers to knowledge workers. As salespeople struggle with these new roles, they are encountering a need to learn significantly greater amounts of information. Consequently, business leaders are now searching for new ways to improve sales training. One concept they should explore is the use of learning strategies to improve the effectiveness of sales training.

The purpose of the study was to identify the learning strategies used by advertising salespeople in Montana, to investigate the relationship between learning strategies and demographic variables, and to explore patterns of learning of distinct groups that existed in the sample. The Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) was used to measure learning strategies. The sample included 91 advertising salespeople. No significant differences were found in the use of learning strategies when the participants were grouped according to gender, age, education level, or years in media sales. Several multivariate analyses using discriminant analysis failed to produce any powerful functions.

The multivariate technique of cluster analysis, however, did produce a solution with four clear and distinct clusters. Resources used a variety of resource strategies to meet their learning needs. Problem Solvers relied on being able to generate alternatives. Architects planned and organized. Believers possessed high levels of confidence in putting together a plan of learning.

The two major conclusions from the study are that distinct groups of learners exist among salespeople and that learning strategies are not linked to demographic variables. These conclusions are consistent with other studies on learning strategies with other populations. Recommendations were made related to further research into the future use of learning strategy based training.

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This thesis has been read by each member of the graduate committee and has been found to be satisfactory regarding content, English usage, format, citations, bibliographic style, and consistency, and is ready for submission to the College of Graduate Studies.

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ABSTRACT

Businesses face many changes in a world dominated by technology, global market forces, and continuous reorganization. Among the most significant of the changes are the new responsibilities sales forces are taking on. In their quest to adopt the marketing concept, organizations are converting their salespeople from order takers to knowledge workers. As salespeople struggle with these new roles, they are encountering a need to learn significantly greater amounts of information. Consequently, business leaders are now searching for new ways to improve sales training. One concept they should explore is the use of learning strategies to improve the effectiveness of sales training.

The purpose of the study was to identify the learning strategies used by advertising salespeople in Montana, to investigate the relationship between learning strategies and demographic variables, and to explore patterns of learning of distinct groups that existed in the sample. The Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) was used to measure learning strategies. The sample included 91 advertising salespeople. No significant differences were found in the use of learning strategies when the participants were grouped according to gender, age, education level, or years in media sales. Several multivariate analyses using discriminant analysis failed to produce any powerful functions.

The multivariate technique of cluster analysis, however, did produce a solution with four clear and distinct clusters. Resources used a variety of resource strategies to meet their learning needs. Problem Solvers relied on being able to generate alternatives. Architects planned and organized. Believers possessed high levels of confidence in putting together a plan of learning.

The two major conclusions from the study are that distinct groups of learners exist among salespeople and that learning strategies are not linked to demographic variables. These conclusions are consistent with other studies on learning strategies with other populations. Recommendations were made related to further research into the future use of learning strategy based training.

CHAPTER 1 .

INTRODUCTION

The Changing World of Sales

Salespeople face real life learning problems every day. These problems require a variety of problem solving skills ranging from critical analysis of customer needs to analysis of the complexities their own company's new product. Furthermore, learning problems exist in a global economy which finds customers from around the world demanding more and more.

Price Pritchett(1996) described the issue,

As consumers, we get more demanding all the time. We want quality stuff. We want it faster. And cheaper. Plus, we want more choices to pick from. Whoever comes along that can satisfy all these wants the best gets our business. That is until somebody else shows up offering a still better deal (p3).

Customers are demanding more. If they do not get what they want, they go somewhere else. Yet, a Burroughs Branch Sales Manager motivated his sales force to get out there and sell by appealing to their importance in the overall

structure of things. He emphasized that "nothing ever happens until a sale is made! The economy revolves around us" (Wilson, 1974).

However, to make the sale in today's global marketplace, the salesperson faces an environment of continuous change. The salesperson finds that communication is instantaneous almost anywhere in the world. Information, once a source of power, is now a commodity. Small bits and pieces of knowledge about a customer's wants and needs often sway a sale.

In order for salespeople to succeed and subsequently for their organizations to succeed, salespersons need to continually learn. They are and will continue to be self-directed, continuous, lifelong learners. Salespeople, in today's competitive business structure personify the adult learner described by Malcolm Knowles (1970). They are motivated to learn because they have a need to acquire new knowledge and skills to achieve their sales goals and solve their customers' problems. If salespeople are to gain the knowledge required to achieve this success for themselves and their company, they will have to be self-directed, or they will be left behind. They will be required to learn new knowledge and skills not just because they want to but because it is necessary. The learning requirements

salespeople face are problem centered and oriented around life tasks. They need to acquire the skills or knowledge now in order to successfully apply it immediately. If they do not learn it now, someone else who has learned it will, like in Pritchett's example, get the sale.

Consequently, learning has to be learner-centered by focusing on the salesperson. If learning revolves around the teacher (trainer) and not the salesperson, a risk of learning the wrong thing becomes a possibility. Today's marketplace does not often allow participants the luxury of a second chance. The material being learned has to be relevant to what a salesperson needs to know now.

Salespeople are faced with constant learning needs. For instance, they have to learn how to determine the amount of time to devote to improving their sales skills, researching solutions to a customer's problem, practicing the use of the company's new improved product, or making telephone calls to set up appointments. Salespeople are faced with vast learning requirements today, and the demand in the future will increase at exponential rates. New technology will require salespeople to learn new ways to improve efficiency and communication using the latest in technological innovations. The strategies a salesperson uses to learn the vast amount of new information and skills

required to do the job will have an enormous influence on overall success.

Hal Lancaster (1997), a Wall Street Journal columnist, focused on these issues in a recent column. This column summarizes the current situation in the world of sales. He discussed the differences in selling 20 years ago to today with Ted Urpens, a veteran salesperson with Caradon Everest—a British maker of replacement windows. "Entrance standards were minimal. If you could talk and read a price list," said Urpens, "you could earn a good living from limited skills" (p. M1). Lancaster pointed out the window company now gives its salespeople lap top computers to configure custom replacement window systems, including pricing. With this technology, the salesperson can quickly computerize a task previously requiring several technicians and a week's worth of time.

There is more to come. Urpens explained how the salesperson will have more data and product options available and will have to know computers well enough to put a proposal together in a comprehensible way. "More time will be spent on defining customer problems and finding solutions, as a consultant would, than in selling off-the-shelf products. Quality and depth of knowledge will increase," (p.M1) continued Urpens.

Lancaster also cited Caradon Everest sales manager Richard Jones who pointed out how downsized, slimmer organizations also result in flatter sales organizations. This trend leads to significantly different duties for salespeople. These duties ultimately require salespeople to take on more responsibility for increasing company sales.

Jones also reflects on how sales managers are now required to learn new ways to coach sales representatives as they assume more responsibility for implementing company marketing strategies. Jones implies that both the salesperson and sales manager face new challenges in continually learning new knowledge.

Lancaster concludes that salespeople will have to learn and continue to relearn how to use the new technologies sales organizations are adapting while still focusing on their customer's business needs. If they are unable to accomplish this task, they are likely to be unsuccessful in the marketplace as well as in their own company.

Sales Force Education

As Ted Urpens noted, salespeople have not always had these demands for learning placed on them. In fact, businesses have needed "educated" salespeople only since the

late 1950's and early 1960's. Prior to World War I most businesses rarely used a salesperson. With little need for salespeople, companies did not put much effort into training. Consequently, the history of sales force education is short.

This lack of need for knowledge dates back to the founding of the United States. From early colonial times, the United States has enjoyed strong markets at both home and abroad. The colonists traded their excess food, timber, and other raw materials to England for manufactured goods (Griffin & Ebert, 1996, p. 36). During the Industrial Revolution, America changed from a dependence on muscle, both human and animal, to a reliance on machinery. However, the country was still unable to increase output enough to meet demand for goods. Demand continued to expand at a great rate (p. 38).

A good example of how the Industrial Revolution changed the growth in demand is found in Henry Ford's development of the assembly line. Because of the new efficiencies of the assembly line, Ford was able to turn out hundreds of cars in a shorter period of time and at a lower cost than ever before. When new consumer finance techniques were coupled with the lower prices resulting from Ford's improved production efficiencies, "he made the automobile affordable

for the average person" (Griffin & Ebert, 1996, p. 38). Sales skyrocketed. The salesperson's role was limited to writing up the order.

Another example of the production orientation of this period is found in the popular cliché which had its origins during the Industrial Revolution: "Build a better mousetrap, and the world will beat a path to your door." This saying was really an illustration of business philosophy, and this philosophy was completely production oriented. People would buy whatever was built. Marketing was unheard of at this time and was not really needed.

Without the need to persuade customers that they should buy their product, few companies employed salespeople. Instead, engineers simply developed new products, and production manufactured them. To sell the product, business merely had to place a picture of the product in a catalog or display it in downtown retail stores where eager customers purchased most any new product.

Production and engineering shaped business philosophy in the United States well into World War II. Any company employing salespeople primarily used them as public relations agents. However, World War II created a new situation. The war effort resulted in a partnership between business and government that created an industrial system

capable of immense production (Archer, 1996). Once the need for tanks and bombs was over, American industry turned to a war-ravaged world that needed everything. Consumer products were almost non-existent in Europe and Asia where the war was fought (Archer, (1996). In America, the demand for consumer goods that had been frustrated by wartime shortages fueled the US economy for some time (Griffin & Ebert (1996)p. 39). With most of the world's manufacturing capacity, with a huge portion of the world's known natural resources, with manufacturing knowledge based on experience, and with the majority of scientists including Germans who had fled the crumbling German war machine, the United States rapidly built a tremendous economy based on consumer wants and needs.

The United States also created the purchasing power required to develop a consumer-oriented economy by putting thousands of former soldiers to work in factories converted from war use to production of goods. Thousands of others entered college on the GI Bill. Graduates landed management jobs in all types of industries. The standard of living shot up in the United States (Griffen & Ebert, 1996, p. 39). Some Women moved back from the factory floor to the home. Families were formed. Lots of children were born giving rise to the Baby Boomer Generation.

The world would never be the same. Money flowed into the pockets of millions creating the largest concentration of purchasing power ever. As Europe and Asia rebuilt their economies, consumer demand spread throughout the free world. Business reacted with endless new products never seen before.

The Marketing Concept

As demand grew, new companies entered the marketplace to participate in America's economic growth. In many cases, companies competed within a market with similar products. Business needed a way to convince the public its product was the best and provided the most benefits.

Mass advertising was the first tool industry leaders used to convince consumers to buy their product. The role of salespeople was limited to contacting customers and picking up the order, which was very much like Ted Urpens's description of a typical salesperson.

Thousands of salespeople were hired. However, their primary role was to meet and greet customers. Frequently, the most successful salespeople were the ones who could tell the best jokes or take their customers to the best restaurants for lunch. Training was not a primary concern.

Companies that did provide training focused on basic product knowledge and manipulative closing techniques. Following this orientation, salespeople hit the road to sell. Getting the order was their only objective. Salespeople relied on their natural ability to develop and give sales presentations in order to close a sale.

This traditional sales philosophy still pervades many organization's sales philosophy. For instance, Orvel Ray Wilson, creator of the currently popular Guerrilla Selling series, illustrates how widespread the traditional sales training approach is when he opens his seminars with the following ice breaker: "How many of you are graduates of the traditional three part sales training system? Here's your desk. Here's your phone. Start selling" (Wilson, 1997),

The lack of training forced most salespeople to learn what they needed to know through trial-and-error. It was during this era that the stereotype of the "natural born" salesperson was created. This was due to the fact that those who did not have the wit and skill to make a customer like them, they rarely got the order.

In the late 1950's business leaders started to build a consumer-oriented economy. Companies discovered a need to take a greater look at the customer's needs. One of the first documented examples of this change was in a 1957 paper

presented by General Electric executive, J.B. McKitterick. McKitterick developed and explained what is now known as the marketing concept. He suggested that business leaders should apply it to all aspects of their business. The marketing concept centered on the idea of businesses basing their product and service decisions on what customers needed rather than on what the company could produce.

Wilson Learning Corporation is credited with introducing the first market-oriented sales training in the late 1960's when it released a course entitled "Counselor Selling." Mack Hanan (1973) introduced the concept that salespeople could do a greater volume of business if they replaced manipulation with information giving and negotiation.

Although Hanan advocated a customer-oriented approach to sales in the seventies, his approach was not accepted by very many sales organizations. Instead, company decision makers retained the traditional sales model of trying to convince prospects they needed the salesperson's product whether or not any real need had been established (Manning & Reece, 1992, p. 8).

For instance, a very popular corporate training system of the early seventies was the Lee Dubois Sales Method. The Dubois method featured a polished presenter with a large

three-ring binder containing a week's worth of notes and hours of video presentations telling salespeople exactly what to say and when to say it. Each day participants would view demonstrations of sales skills on video tape and then practice the specific phrases designed to overcome objections and to close sales. Often, in training situation like this, the material is forgotten soon after the sales training session (Strutton, 1994).

However, as competition increased for the American consumers' dollars, both from domestic and global companies, business started to realize it needed to place its emphasis on meeting consumer needs. Progressive corporations and business schools embraced this new marketing concept. With the advent of the nineties, the marketing concept was well entrenched as the primary strategy of American business. Planners advocated doing whatever necessary to learn what their customers wanted. Product managers based new products on the results of extensive marketing research studies. One result of this shift in business philosophy is a dramatic change in the salesperson's job requiring knowledge to succeed in making a sale.

New Learning Demands

Chief executives now acknowledge that knowledge is the key to competitive advantage. A forum of key executives from American industry concluded that major changes in the structure of the global marketplace are forcing business to place its emphasis on learning and knowledge and not on traditional factors like capital and equipment (Chief Executive, 1997). For instance, corporate leaders say the development of the virtual enterprise will drive success in the future (Chief Executive, 1997, p. 56). Virtual enterprise is a concept that encompasses data warehousing, decision support technology, and the understanding customers at a level of detail that no one has ever understood before. Furthermore, the virtual enterprise has expanded competition from a few, highly-capitalized firms, to large numbers of competitors where anyone of them can bid on the smallest of products (Chief Executive, 1997, p. 57).

If salespeople are to succeed in this new global, virtual enterprise, they will face the need to learn more and to learn it faster. The strategies they use to learn new information or to determine what to use from the past and what to discard could mean the difference between success for both themselves as well as their organization.

As companies adopt a knowledge-based strategy, the sales forces will become a key ingredient in gaining a

competitive advantage. This means more training. How this training is delivered and the strategies salespeople use to learn could have a major impact on the success of creating the competitive advantages that drive the world's business firms today.

For instance, today the knowledge required of a salesperson continues to expand as pointed out in Hal Lancaster's Wall Street Journal article. Most people involved in person-to-person selling have fairly sophisticated products to sell. Salespeople require a great deal of product knowledge just to be able to explain the benefits of the product or service. This is true whether one is selling insurance, automobiles, chemicals, or aircraft. To differentiate their products, companies have made them more complex.

Salespeople also have to learn about their prospective customers' businesses and even their customers' customers' business in order to describe how their product can be beneficial. In addition, salespeople need to be part psychologist in order to try and understand a customer's decision-making process. A salesperson can no longer approach an analytical person and expect to make a sale by being friendly and telling jokes. On the other hand, a person's probability of making a sale to a fun loving,

expressive person is also low if they are given large quantities of specification sheets. Consequently, salespeople need to learn about their prospects. They also have to learn about how other people besides the primary prospect influence a sale. For example, a manager may rely on a receptionist for ideas and opinions about a product and the company selling the product.

Technology continues to impact nearly every salesperson. Customers, supervisors, and spouses are able to contact most salespeople at any time via a cellular telephone. Lap top computers enable salespeople to put on sophisticated presentations and demonstrations right in the client's office. Complex pricing structures are simplified by sophisticated computer programs making negotiations shorter and more precise. Video conferencing allows salespeople to spend more time in the field and less time traveling to distant meetings.

However, these changes in the sales profession also require changes in the training salespeople receive. The constant change of the global economy means what salespeople learn about their customer's product needs today is probably obsolete tomorrow. The short life cycles of computer products almost guarantees that salespeople will need to continually update themselves on how to use technology to

improve productivity. Furthermore, the new emphasis placed on relationship selling, where the salesperson becomes the primary customer contact and provider of customer information to the company, demands the learning of new sales skills beyond traditional closing techniques or handling of objections (Manning & Reece, 1992, p. 10).

Adult Learning

The education and training of salespeople falls within the parameters of adult education. The focus of adult education has shifted away from teaching to learning (Felleng & Conti, 1989, p. 1; Kidd, 1973). Leaders in this field such as Knowles postulate the concept of andragogy: The "educational mode in which the teacher is viewed as a facilitator of learning, students are perceived as self-directed, and the climate of learning is informal and collaborative (Knowles, 1975, p. 54). A major part of the definition of andragogy stresses the growth of self-direction in learning and the use of experience of the learner in the educational process (Davenport, 1987; Knowles, 1968). The similarity between the concepts of andragogy and a person's need to learn continually and often in a self-directed manner lends credence to the notion that

sales training and education are adult education programs. Given that the information required and the technological change so rapid in the sales arena, it obligates sales trainers and managers to explore new ways to promote adult education which fosters lifelong learning.

Salespeople may use a variety of learning strategies to acquire the skills necessary to be successful. Specifically, those skills are primarily the salesperson's ability to find and process information and to make decisions. Salespeople are constantly required to learn in real-life situations. Adult learning tasks are performed with the intent of solving problems in real-life situations. "Such learning usually involves problem solving, reflection on experience, or planning for one of the numerous tasks or challenges of adult life" (Fellenz & Conti, 1993, pp. 1-2). Learning strategies are the techniques or specialized skills that a learner has developed to use in both formal and informal learning situations (McKeachie, 1988, p. 3). Learning strategies are the strategies used to solve real-life problems (Conti & Fellenz, 1991). Real-life problems and challenges face salespeople every day.

The Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) instrument was developed to measure adult

learning strategies in real-life situations (Conti & Fellenz, 1991).

SKILLS is based upon five aspects of learning which are essential to the learning process and that have the potential for improvement through the refinement of learning strategies. These are the constructs of critical thinking, memory, metacognition, metamotivation, and resource management. (p. 65)

These five constructs each contain three associated learning strategies. Critical thinking is composed of the strategies of testing assumptions, generating alternatives, and conditional acceptance; memory is composed of the strategies of organization, external aids, and memory applications; metacognition is composed of the strategies of planning, monitoring, adjusting; metamotivation is composed of the strategies of attention, reward/enjoyment, confidence; and resource management is composed of the strategies of identifying resources, critical use of resources, and use of human resources (pp. 65-66).

As more and more companies proclaim the need for customer-oriented, problem-solving sales approaches to meet the demands of customers in the next century, there will become an even greater need to explore more efficient ways for salespeople to learn how to provide this service. The learning strategies identified in SKILLS are ones that

salespeople must use, but which ones do they use the most? Are there differences in the learning strategies used by older, more experienced salespeople who really understand sales techniques and their own products and younger, technologically-oriented salespeople who feel comfortable with technology but who have not learned to understand their business or their customers? How important is it for salespeople to use critical thinking skills when analyzing a customer's business, or is memory sufficient in this era of knowledge obsoleting itself in such a short period of time? Answers to these types of questions are needed in order to make training of salespeople efficient.

Problem Statement

The goal of sales training is to prepare individuals to go into the field and be able to meet with customers to determine their needs. Once salespeople find out what a customer's needs are, they can suggest a solution that includes the use of the salesperson's product or service.

However, business is in the process of moving into a period of time in which salespeople have to know more than ever before. Salespeople are taking on much of the responsibility of providing the knowledge business needs to

know to compete in a global marketplace. To provide this knowledge a salesperson has to learn more. They also have to learn new information in less time and on a continual basis. The strategies a salesperson chooses in order to learn new knowledge could make the difference between success and failure for both the organization and the individual salesperson. Furthermore, the strategies selected could be affected by various variables such as age, experience, education, and past training. Even though there is a growing body of knowledge on learning strategies (e.g., studies by Kolody and Lockwood), it is unknown at this time how strategies are chosen by salespeople or how various variables affect the selection.

Purpose

The purpose of this study was to describe the learning strategies used by salespeople in the media advertising profession in order to solve real-life problems. To accomplish this, this study investigated the relationship of learning strategies to age, gender, education, and experience. The study also explored whether there are distinct groups of learners among people in the advertising sales profession.

Research Questions

This study investigated learning strategies used in real-life learning situations by salespeople. The study involved salespeople who sell advertising for newspapers, radio stations, and television stations in larger Montana markets. The use of specific learning strategies was measured with SKILLS. The following three research questions were addressed in the study:

1. What is the profile of learning strategies used by advertising salespeople in Montana?
2. Using a modified version of SKILLS, is it possible to discriminate between groups of salespeople grouped by age, gender, education, and experience?
3. Is it possible to identify and describe distinct clusters or learning groups that may

exist among advertising salespeople in Montana based on SKILLS scores of learning strategies used in professional, real-life situations?

Significance of the Study

Finding out how salespeople actually learn through the strategies they employ is of great importance to the training of salespeople. Knowledge of the way strategies are used can be used to develop new sales training programs that take advantage of the strengths of the people involved and to train those in strategies they need to learn.

Furthermore, this information could prove beneficial in helping salespeople improve their effectiveness as both self-directed learners and continuous, lifelong learners. By knowing what strategies are most effective for themselves, salespeople could be empowered to chart out what learning they require for success in their jobs and not rely on management to tell them what they need to know.

Knowledge about learning strategies could also motivate needed train-the-trainer workshops for professionals involved in training salespeople. Since this is one of the primary channels for delivering training to salespeople, the

trainers require strong evidence to change a major industry in which they have a large financial stake.

Definition of Terms

Critical Thinking: Reflective thinking focused on what to believe or do. It includes identifying and challenging assumptions, challenging the importance of context, imagining and exploring alternatives, and reflective skepticism (Brookfield, 1987, p. 12).

Learning Strategies: The techniques and skills that an individual elects to use in order to accomplish a specific learning task. Such strategies vary by individual and by learning objective. Often they are so customary to learners that they are given little thought; at other times much deliberation occurs before a learning strategy is selected for a specific learning task (Fellenz & Conti, 1989, p. 1).

Memory: Storage, retention, and retrieval of knowledge.

Memory strategies associated with adult real-life learning are rehearsal, organization, external aids, and memory application (Fellenz & Conti, 1993, p. 18).

Metacognition: Thinking about the process of learning and emphasizing self-regulatory tactics to ensure success in the learning endeavor (Fellenz & Conti, 1989, p. 2).

Metamotivation: Tactics and techniques used by the learner to provide internal impetus in accomplishing learning tasks, not necessarily in an education program (Fellenz & Conti, 1993, p. 10).

Resource Management: Identification of appropriate resources, the critical manner in which they are used, and/or the use of human resources in learning situations or activities (Fellenz, 1993, p. 27).

SKILLS: Acronym for Self-Knowledge Inventory of Lifelong Learning Strategies. It is a learning strategies inventory with established validity and reliability which usually asks respondents to rate 15 learning strategies in 4 of 6 scenarios commonly found in everyday life and which call for a learning effort on the part of the respondent (Fellenz, 1993, p. 2).

Assumptions

This study assumed that the sales scenarios developed for the SKILLS instrument reflect the type of learning situations experienced by those who participated in the

study. These scenarios involved such things as recruiting new salespeople and writing a letter to the home office. These are typical experiences that a salesperson might experience within their work environment.

Delimitations

The study sample was restricted to newspaper, television, and radio advertising salespeople in the major markets of Montana that were interested and willing to participate in the study. The participating employees within these businesses were volunteers. The generalizability of the results of this study are limited to the population that participated due to the volunteer nature of both the business and the participating employees.

In addition, in recent years several studies have been done to provide further understanding about the learning strategies used by adults in real-life situations. This study is part of this team effort to investigate learning strategies among various populations. As a result, the design and statistical analysis of this study was tailored to match the team effort and provide results that may contribute to this growing body of knowledge. Previous studies investigated a variety of adult populations. Among

others the population studied were learning disabled students (Hays, 1995), Native American tribal college students (Bighorn, 1997, Hill, 1992), school administrators (McKenna, 1991), Canadian college students (Kolody, 1997), people in the workplace (Ghering, 1997), and Air Force officers (Korinek, 1997).

CHAPTER 2

REVIEW OF RELATED LITERATURE

Today's Sales Environment

In the past two decades salespeople have undergone a transformational change moving from order takers to knowledge workers who require continuous learning to survive in a company that competes in the global economy (Lancaster, 1997, p. M1). The selling environment has changed. Global competition, rapid product obsolescence due to accelerating product life cycles and rapid changes in technology has forced salespeople to operate differently if they want to succeed (Geber, 1993, p. 45).

The change in the selling environment has a significant impact on business. Stanton and Futtrell (1987, p. 440) stated that "Personal selling is the major promotional method used in American business--whether measured by people employed, by total expenditures, or by expenses as a percentage of sales."

Among the impacts in the increased importance of knowledge. Chief Executive magazine (Chief Executive, 1997,

p. 53) introduced a roundtable on knowledge by proclaiming a major change in United States companies:

thus far (American companies) have been able to reinvent themselves either wholesale or by degrees to take advantage of an increasingly critical asset: knowledge. Over the last 10 years, the basis of competitive advantage has shifted toward how well expertise and information can be focused on speeding products and services to market.

Organizations are now more aware of the importance of information and the role of the sales force to use the knowledge. Howard J. Schwartz, CEO of an \$80 million trading and research firm reflected on the use of information at the Chief Executive magazine roundtable, "it's how you use it." That's where you have the competitive advantage. . . the point is that we've organized the business and the sales force around the information , became the market leader, gained the competitive advantage . . ." (Chief Executive, 1997, p. 56).

As knowledge has gained in importance, so has the role of the salesperson. Manning and Reece (1992, p. 6) describe this change as follows:

We have seen the evolution of personal selling from an era that emphasized "pushing products" to an era that emphasizes "partnering." Throughout this period we have seen the emergence of new thinking patterns regarding every aspect of sales and sales management. Salespeople today are

increasingly becoming diagnosticians of customers' needs and problems.

One of the principal differences in today's selling environment is the customer. Ken Gross, manager of sales for a San Francisco pharmaceutical company, explains that "companies are slashing costs just to stay solvent in today's fiercely competitive marketplace. There's more pressure on buyers within those companies to make better buying decisions" (Geber, 1993 p. 45).

The need of buyers to make better decisions puts additional pressure on salespeople to differentiate their product. Product differentiation is now one of marketer's greatest challenges (Reece, Manning, 1992, p. 12). Salespeople used to be able to differentiate their product with a few technical features. Knowledge is now becoming the primary way salespeople can differentiate themselves.

One way salespeople are using knowledge to differentiate their products and services, is to demonstrate knowledge of the customer's customer, or end-user knowledge (Smith, Owens, 1995, p. 1). Smith and Owens' (1995) study looked at the importance of end-user knowledge. Over 30% of buyers in their study indicated they would buy from salespeople with a high degree of end-user knowledge. This number increased to 49% when companies with high market

volatility, such as technological products, were surveyed. Among Smith and Owens' conclusions was the observation that "the knowledge gained from these investments (in end-user knowledge) must be effectively transferred to the sales force" (1995, p. 14). In other words, organizations need to find effective means to help salespeople learn this knowledge.

Inc magazine described an example of how Ballard Medical Products takes advantage of their knowledge of end-user needs. By working closely with doctors, nurses and medical technicians on how Ballard's products can help them, Ballard is able to sell more to the medical institutions employing them (Richard, 1988, p. 96).

Products and services are also changing. Today's innovative, breakthrough product is tomorrow's commodity. For example, computer companies 10 years ago would introduce a new product and not expect competition to place a similar product on the market for at least a year. Salespeople could rely on the uniqueness of the product alone to drive sales without any interference from competition. (Geber, 1993, p. 45).

However, short product life cycles now ensure that salespeople will face competitive pressures almost immediately. Jane Ferrer, director of training and

education at Medtronic Inc., says that "there is a constant steep learning curve brought on by the frequent need to learn about new products and equally frequent need to figure out how to position the product in a constantly changing marketplace" (Geber, 1993, p. 47). The implication for a salesperson is the need to prepare one sales strategy for the first few months following a product's introduction, another as the product climbs the growth stage of the product life cycle curve, and another when the product reaches maturity.

Many salespeople used to rely on either quality or price to close a sale. Now salespeople need to approach his or her strategy differently. For instance, a Learning International research study found quality and price were low on the scale of factors people used to make a purchase decision. These factors were now considered a minimum expectation to even consider a product or service. Learning International's findings indicated intangibles were the primary consideration. The main intangible was a salesperson's ability to help the customer find the best solution to a problem (Callahan, 1992).

As companies move to extend the marketing concept to the sales function, they are finding that salespeople need to change their approach by putting the customer first.

Customers are expected to respond to the consummate professionals who earn their trust ("Sales Savvy for the Nineties", 1992). Many sales managers think that one way to do this is to put more emphasis on the customers plan. Gerald Jones, executive vice president of a Boston-based consulting firm, thinks that "qualifying a customer is a more strategic process than before, one that often involves sales managers and executives. Many people think that one of the five most important things a company can do is pick its customers" (Geber, 1993, p. 48).

Old approaches to sales no longer work. For example, Scott Bell, who works in CAD/CAM contrasted how his company's technique of selling several years ago is not appropriate today. He explained how a salesperson with a smooth manner and a glib tongue could show a technologically naive customer a testimonial from another customer and then close the sale. Bell went on to explain how customers now have technological experts with more knowledge than the salespeople have. To succeed now, salespeople have to do extensive homework on the customer's company, the industry it is in, the position it holds in the industry and the trends that affect its status. Bell contends that "the customer wants to work with someone who really understands the issues and how the company fits in . . . is the customer

the number-one player in its market? Is it number two and trying to catch up? Customers are looking for a higher level of intelligence displayed during a sales call" (Geber, 1993, p. 47).

Value-added service is becoming one area that companies may use to differentiate themselves in the global marketplace. John J. Franco of Learning International explains how "satisfying customers and improving performance is a company-wide responsibility--but one in which salespeople play a pivotal role" (Callahan, 1992, p. 32). The salesperson's role is like that of a conductor. Salespeople must orchestrate the organization's response to customer needs. Franco summarized by saying that "above all, salespeople must demonstrate trustworthiness and an ability to solve problems, even if the solution does not include the organization's product or service" (Callahan, 1992, p. 32). Edward R. Del Gaizo, also of Learning International, pointed out the significant role of the salesperson in serving the customer, "The implication is that the salesperson--even more than the organization, the customer service people, or the product--can make or break a buyer relationship" (Callahan, 1992, p32).

Among the changes taking place in the sales profession is a need for salespeople to start taking more

responsibility for their own development and efforts.

Thomas N. Ingram, who holds a chair in sales excellence at Memphis State University and is editor of the *Journal of Personal Selling and Sales Management*, thinks salespeople depend on their sales organizations too much for training and skill development. Issues such as technology linking various workplace locations and the phenomena of people working on their own have convinced him that "salespeople really are going to have to become more self-sufficient. That, in itself is a skill-building process" ("Sales Savvy" 1992, p. 16).

Ingram also suggests organizations develop self-sufficiency skill-building. A program for this would include models for self assessment, looking for ways to improve performance, and finding resources for self-improvement. In the process, companies need to bridge the gap from "here's your quota" to "here's your job, here's what we are looking for, and here are some ways for you to get there." (p. 16). In this way salespeople can learn what their abilities are and to evaluate needed training to meet company goals.

Another area Lawson comments on includes researching the competition, managing time-and-territory, deciding how to set yourself apart from other salespeople, mapping out a

plan, and following up on if the plan is working. If it is not, it needs to be changed (Sales Savvy...).

Learning is also a theme espoused by Gerhard Gschwandtner, publisher of *Personal Selling Power* magazine. Two of Gschwandtner's recommendations include a commitment to ongoing self-improvement and benchmarking. Salespeople need to:

realize that sales training is not, as some trainers view it, an adrenaline shot, but more like the first stage of a rocket, something that launches the salesperson, who then continues on a trajectory into orbit through independent learning. Sales trainers, like good teachers, must teach salespeople how to learn on their own-- how to become responsible for their own training beyond the classroom. Sales trainers should be able to lead salespeople to valuable and useful sources of information (Sales Savvy, 1992, p. 13).

Gschwandtner's recommendation on benchmarking calls for salespeople to benchmark their performance against leaders in both their own company and other companies. They should find ways to measure their own effectiveness and in measuring their training effectiveness (Sales Savvy 1992, p. 13).

Sales Training

Sales training is frequently suggested as a means to increase sales force productivity, stimulate communication

inside and outside the organization, reduce inter- and intra-departmental misunderstandings, improve supervision, enrich sales force morale, and decrease selling costs (Churchill, Ford, Hartley & Walker, 1986 p. 66). If such goals are reached, organizations would easily have satisfied, motivated, effective sales forces.

Therefore, it is not surprising to find that companies dedicate more hours to train salespeople than any other employee (Filipczak, 1992 p. 43). Likewise, it is not surprising to find businesses spending large cash expenditures for salespeople. Field costs, the initial costs to establish a sales trainee, in industrial products, consumer products, and service organizations have been estimated to be \$40,407, \$37,513, and \$33,333, respectively. Actual costs for initial sales training for the average sales position varies between \$22,500 and \$28,455 (Sales & Marketing Management in Dubinsky, 1996, p. 67). Technical sales position training often runs as high as \$100,000 (Churchill, Ford, Hartley and Walker, 1990 p. 67). Moreover, the expense incurred to train a salesperson is probably even higher when opportunity costs of lost business, poor customer relations, and employee inefficiency (from inadequate training) are considered (Stanton and Buskirk, 1987).

Consequently, organizations tend to be concerned with the effectiveness of sales training. Alan Dubinsky (1996) explored what the literature stated were the eight primary assumptions of effective sales training. These were:

1. The greater the proportion of sales training provided by a sales trainer the more effective the training program.
2. The greater the proportion of sales training devoted to product knowledge, the more effective the training program.
3. The more prior sale experience sales trainees have, the more effective the training program.
4. The lower the proportion of the sales manager's time devoted to selling activities, the more effective the training program.
5. The greater the number of salespeople employed by a firm, the more effective the training program.
6. The higher the level of annual company sales, the more effective the training program.
7. The more rapid the rate of product obsolescence experienced by a firm, the more effective the training program.

8. The greater the degree of competition faced by a firm, the more effective the training program. (p. 68-70)

When Dubinsky surveyed a broad spectrum of salespeople from different industries, he found only two assumptions were considered to lead to effective sales training. First, he found a positive relationship between the effectiveness of sales training and the proportion of time sales managers devote to their own selling activities (Dubinsky 1996, p. 72). However, Dubinsky had expected a negative relationship (p. 72). This leads to a question of whether sales managers should spend extensive time with salespeople.

Dubinsky concluded that sales managers who spent too much time training salespeople were seen to be "coddling" the trainees, which reduced the effectiveness of sales training. On the other hand, those sales managers who spent less time with trainees were seen as forcing the salesperson to accept more of the burden in planning and implementing the training process. These salespeople had to spend more time planning, testing their plans against the goals the sales manager set for them, finding other resources to help them, and relying on experience. Since these salespeople

were found in successful companies, the trainee was generally motivated by the goal of success as well (p74).

Other evidence points to a greater emphasis on self-direction among and between sales managers and salespeople. For instance, James L. Strutton, (1994) a Senior Vice President of the Fortune Group, Inc., points out that sales training fails when it is based on a single event or seminar taught by outside consultants or trainers (Strutton, 1994 p. 14). This type of learning failed because there was a lack of use or motivation to use the training back in the workplace after the seminar is over.

Strutton, (1994) believes the solution to this problem is to train top managers as facilitators who learn the material from the salesperson's point of view. The managers learn how to develop realistic learning exercises for their salespeople, how to lead discussions, how to customize materials, and how to manage a classroom. When the top managers return to the company, they train other managers and salespeople in how to train the company's sales force. Then those people train other people in a cascading effect throughout the organization. The materials of the seminar are repeated periodically throughout the year in order to keep the training methods current in the sales force's memory.

The effect of this is one of building a cohesive organization in which managers become the best trainers because of their vested interest in the success of the salesperson, and the salespeople learn best from the managers because they are able to learn what they need to learn.

Another Fortune Group executive, Steven W. Brown (1993), expanded on how managers should approach sales training by emphasizing the building a relationships with a firm's customers. Brown's research shows that salespeople who build trust from the beginning of the relationship find closing and beginning a relationship as easy as getting "yes" to the question "Will you marry me?"

However, according to Brown, most sales training programs start with tactics for closing sales as the most important part of the sales process, then move to presentations, and finally include a small amount on building relationships. Brown, (1993) draws an analogy to a Victorian marriage proposal that illustrates current problems with sales and sales training:

this kind of emphasis puts the sales representative in the position of a suitor in a Victorian novel. He has barely met the girl; but convention demands that he propose marriage before he can get to know her. He uses a well-rehearsed speech to try to persuade her of his worthiness. He has no idea of whether his attention is welcome or utterly inappropriate. He's

terrified because everything hinges on her "yes" or "no" (p. 15).

Brown suggests turning this approach upside down. Spend most of the training time on teaching the skills of building relationships--learning to listen, creating confidence by reflecting understanding of the prospective buyer's specific needs and concerns, establishing trust, and creatively collaborating with the buyer to solve their problems on an on-going basis.

With the interest shown in making the sales manager the teacher, David C. Sheperd and Rick E. Ridnour (1995) looked into the current state of training of sales managers. They found most sales management training still focuses on traditional coaching, motivation, and time management. Although there was some interest in problem solving, the topic had been incorporated into very few programs. There was little evidence of addressing important topics like competitive analysis, quota setting, forecasting, and developing a plan. This study also found that training exhibited the problems Brown discussed, that the training of sales managers focused on traditional selling and management skills. In addition, the focus of the training was by outside sales trainers, which led to the training of the

sales staff by outside trainers. This is the very problem Strutton addressed.

Sheperd and Ridnour also pointed out the lack of analysis on involving sales managers in the motivation from the standpoint of rewards, both monetary and non-monetary. In addition, they explored the need to incorporate sales managers and senior salespeople in the training of other salespeople. Again this is the point Strutton was making.

With the changes going on in the sales industry of moving from a highly-authoritative, order-taking structure, to a wider-open, empowered salesperson, the traditional role of the sales manager may change. This new role could require less of a sales administration and support effort. It may even mean a smaller direct role in sales training and could involve totally re-engineering the sales manager role (Keenan Jr., 1994 p. 67).

For example Edward Jones Co., a national stock brokerage firm, has eliminated the sales manager role and now puts the responsibility for training and reporting onto the salespeople. The salespeople do this by communicating directly with coordinators in the St. Louis headquarters via computers and satellite television.

The Jones' model relies on salespeople planning their training efforts and monitoring them against the goals

established by the corporate office. The salespeople are trained to spend a large percentage of their time analyzing the customer's financial needs and how Jones could meet those needs.

Dennis Koczara, IDS Financial Services manager, agrees that the exhortative, demanding, numbers-oriented field general is vanishing (Kennan Jr. 1994 p. 68). "The manager will have to become more attentive to developing the personal skills of his or her salespeople and creating an environment of learning. Managers will have to open up to upward feedback from their salespeople" (p. 68).

The focus on individualized sales training is emphasized by Katherine Morrall. Morrall quotes Micki Benz of Michigan National Bank, who says, "Sales training is an ongoing commitment. There is no such thing as the spray and pray technique, where you spray employees with knowledge and pray that it takes" (Morrall 1994 p. 11. To respond to competitive demands, salespeople will have to take more responsibility for their training.

Adult Learning

The field of adult learning is relatively new. So new that its first major work, Lindeman's *The Meaning of Adult Education* was published in 1926. Then it was not until the early seventies that J. R. Kidd's *How Adults Learn* came out. Malcolm Knowles, who is often referred to as the father of adult education, released the second edition of his major work *The Modern Practice of Adult Education: From Pedagogy to Androgogy* in 1980, just over twenty-five years ago.

Although recent, the development of adult learning principles is timely. American society is changing at such a rapid pace that new methods are required for the population and workforce to keep pace with the vast amount of knowledge and changes occurring every day. Merriam and Caffarella, (1991 p. 1) in their book *Learning in Adulthood*, cite three factors affecting the increased demand for knowledge and learning among adults. These factors include a dramatic change in demographics as the adult population swells to its largest numbers ever (p. 1). The other two, economics and technology, are intertwined in that technology is reshaping America's economic system to the point where adults must continue their learning virtually continually

once they have completed their formal schooling in order to "function at work, at home, and in their communities" (Merriam and Caffarella, 1991, p. 6).

Demographic changes in the population have prompted the attention of many areas of society including government, industry, and education (Cross, 1981). For the first time in society, adults outnumber youth, people are more educated, and the population has become more diverse. (Merriam & Caffarella, 1991, p. 7) By 1987, more Americans were over the age of 65 than under 25 years of age (Spear & Mocker cited in Merriam & Cunningham, 1984, p. 641). The United States has moved from a predominantly youth-centered society to being a predominantly adult-centered society and is rapidly becoming a predominantly older-adult-oriented society (Knowles, 1984,). Demographics alone will not shape the future growth of adult education. Technological and social factors will play an equally important role. "If deep-rooted technological and social changes continue to transform modern societies through the end of the century, the future of adult education will surely be one of continued growth" (Darkenwald & Merriam, 1982 p. 213).

In a society that continues to change due to technology and other factors, adults continue to require learning. There is increasing recognition of the need for education

throughout the life span. No longer will the learning from childhood provide the skills needed to function throughout a lifetime (Merriam & Caffarella, 1991). People are living and working longer and require learning throughout life including into their older years.

Many researchers have attempted to explain why adults participate in learning activities. Foremost of these was Cyris Houle (Darkenwald & Merriam, 1982). Houle's study of why adult learners pursue continued education was published in his 1961 book, The Inquiring Mind, which laid the foundation for further research concerning motivational orientations of adult learners (Darkenwald & Merriam, 1982). Much additional research attempted to test and refine Houle's basic findings and yielded similar results (Cross, 1981). Houle identified and categorized adult motivations for learning as (a) goal-oriented individuals who view learning as a means to some other end, (b) activity-oriented individuals who participate in learning for the opportunity to meet people rather than to develop a skill or learn a subject matter, and (c) learner-oriented individuals who participate for learning for enjoyment and view learning as an end in and of itself (Brockett & Hiemstra, 1991) Most adult learners fit into the goal-oriented category, as they

learn for very pragmatic reasons such as learning a job skill or dealing with a family problem (Cross, 1981).

Knowles (1984) contends that between 1960 and 1980 more knowledge was gained about adult learners and their characteristics than in all of previous history (p. 6). One of the most long-standing efforts in adult education has been to identify what is unique about adult learning in contrast to youth learning. Based on the newly discovered knowledge of these two decades and the need to better understand adult learning, Knowles (1970) introduced the concept of andragogy to adult education field. Andragogy is the art and science of helping adults learn as opposed to pedagogy, which is the practice of instructing children (Merriam & Caffarella, 1991 p. 249). The model of assumptions regarding adult learners developed by Knowles distinguishes adult education from childhood schooling (Knowles, 1980; Merriam & Caffarella, 1991). Knowles' five assumptions regarding the characteristics of adult learners have significant implications for the design, implementation, and evaluation of adult learning activities (Merriam & Caffarella, 1991). The five assumptions of the andragogical model are:

1. Adults are self-directed learners. Through maturation, a person's self concept moves from dependency toward self-directing.
2. Adults enter into educational experiences with more and better quality experiences than youth. These experiences provide a rich resource for learning.
3. Adults become ready to learn when they experience a need to know something in order to perform more effectively in their lives.
4. Adults enter educational activities with a problem-centered orientation to learning. Learning is organized around practical problem situations, not subjects.
5. Adults are more likely to respond to internal factors such as self-esteem, recognition and better quality of life, than to external factors such as a salary increase (Knowles, 1984, p. 12)

Knowles based his andragogical model on the premises that adults can learn regardless of age, that learning is an internal process, and (c) there are superior conditions of learning and principles of teaching (1980, pp. 55-57). On the other hand, the pedagogical model of learning requires the teacher to determine the content needs of a learning

experience and to organize the content into manageable units. Furthermore, the pedagogical model has the teacher taking responsibility for establishing the flow of the learning experience and determining the most efficient means for transmitting this information to the learners (Knowles, 1984 p. 14). The design of the pedagogical model focuses on the needs of the teacher with little regard for the learner. Andragogy, on the other hand, is much more learner-centered. By focusing on the learner, andragogy provides a learning climate of mutual respect, trust, and collaboration. (p. 18).

Other concepts that Knowles associated with andragogy include: planning the learning experience with the learners, allowing the learners to diagnose their own needs for learning, having learners formulate their own learning objectives and plans, letting learners carry out their learning plans and helping learners evaluate their own learning (p. 18). Consequently, student participation in the learning process is more extensive with the andragogical model.

There is growing evidence that the andragogical assumptions are more realistic than traditional methods of learning as the assumptions have been successfully adopted in a variety of settings at every level of education

including elementary and secondary levels (Knowles, 1984, p. 6). Knowles has redefined his original view of andragogy as more of a spectrum of assumptions about learners regardless of age as opposed to opposite viewpoints of learners characteristics (Knowles, 1980, p. 43) and has received support from some in the field in this new view (Brockett & Hiemstra, 1991, p. 105).

The learning concepts that Knowles identified as andragogy are also appearing in literature aimed at the training community. In their training text, O'Connor, Bronner, and Delaney (1996), develop a training model by contrasting Knowles andragogy to pedagogy (p. 118). They make the case for using andragogy principles for any type of cognitive training. On the other hand, they link pedagogy to a behavioral philosophy in which the best application is for training in low-level skills.

Andragogical theories are also beginning to make their way into the training literature. In an interview with The Forum Corporation (1995), 5 core principles of learning were outlined:

1. Learning is a transformation that takes place over time.
2. Learning follows a continuous cycle of action and reflection.

3. Learning is most effective when it addresses issues relevant to the learner.
4. Learning is most effective when people learn with others.
5. Learning occurs best in a challenging and supportive environment.

Although The Forum Corporation did not cite Knowles or any other adult learning resource, they made it clear in their interview with the journal Industrial & Commercial Training that these principles were, in their opinion, the key to survival of business. The principles are obviously very close to the andragogical assumptions made by Knowles.

As is apparent, Knowles' assumptions about the adult learner have a strong focus on the ability of the learner to be self-directing. After Knowles introduced his concept of andragogy, Tough (1979) estimated that approximately 90% of the population participates in at least one self-directed learning activity a year (p. 172). Tough(1971) defined a learning activity as involving a series of learning sessions adding up to at least seven hours (p. 250), and his model of self-directed learning became the basis for many studies that have verified the existence of self-directed learning (Merriam & Caffarella, 1991, p. 209). Other studies have

reported significant participation in self-directed learning among adults (Penland, 1977). Collectively these studies make a strong case for the nature of adults as independent learners.

Self-directed learning is generally viewed as learning where learners organize their own learning, providing their own direction and evaluation (Merriam & Caffarella, 1991, p. 208). Additional efforts have been made to distinguish between self-directed learning as an internal personality characteristic of the learner and as an external process used by the learner during a learning activity (Brookfield, 1984; Fellenz, 1985).

Like Knowles, Tough (1979) assumed that adults have a wide range of abilities and experiences for planning and guiding their own learning. Based on this assumption, he outlined ways in which adult educators could help self-directed learners primarily by focusing on assisting learners in locating and using a wide variety of resources for planning and carrying out their learning activities. Although the phrase self-directed learning implies learning in isolation, it is not an isolated process but often requires collaboration and support among learners, teachers, and peers (Merriam & Caffarella, 1991, p. 46). While most self-directed learners prefer to maintain complete control

over the direction of their learning, this does not mean they work alone. In fact, self-planned learning often involves more human interaction than traditional classroom learning (Tough, 1979, p. 4).

Adults prefer self-directed learning as a method of learning for a number of reasons. One primary factor is their desire to have control over their learning in terms of the pace and structure of the learning and the flexibility to change their learning strategies as needed (Penland, 1979, p. 174). Other factors include feeling more efficient in conducting their own learning, having the ability to locate and understand resources, and having pride in conducting a learning experience on their own (Tough, 1979, pp. 93-94). These factors provide further support for the independence of adult learners as suggested by Knowles.

According to Tough (1979) and Knowles (1975), the self-directed learning process is composed of a series of fairly structured steps adults use in directing their own learning. Adults move from step to step to achieve their desired learning outcomes. In contrast, Spear and Mocker (1984) and Berger (1990) found that self-directed learners used multiple, somewhat unpredictable approaches as they went about learning. They found that learners did not seem to follow sequential steps but were affected by random events

that altered their learning direction. Berger (1990) further found that some learners did not always even consciously begin the self-directed learning activity (Merriam & Caffarella, 1991, p. 49). Berger also discovered that adults tend to prefer a trial-and-error approach with a preference for hands-on learning and used their successes and failures to guide the learning process. These conflicting findings likely indicate that self-directed learning probably occurs both by design and by chance, depending on the learner and the situation (Merriam and Caffarella, 1991, p. 49).

Closely tied and critical to the concept of self-directed learning is the idea of learning how to learn. Robert Smith (1982) has probably done more to define the concept of learning how to learn than any other researcher in the field of adult education. Learning how to learn refers to "possessing, or acquiring, the knowledge and skill to learn effectively in whatever learning situation one encounters" (p. 19). Three interrelated components of learning-how-to-learn concept are (a)needs, (b)learning style, and (c)training. Needs refers to the operational skills that are necessary for the learner to learn-how-to-learn in a variety of situations such as basic skills in communication and awareness of personal strengths and weaknesses that help the learners plan and evaluate their

learning. Learning style refers to an "individuals characteristic way of processing information, feeling, and behaving in learning situations" (p. 24). Helping learners become aware of their preferred learning style is critical to the learning how to learn concept. The third element, training, refers to organized efforts to foster success in learners in order to help them develop skills as a learner by helping them develop insights and experiences from which to analyze and make adjustments. The increasing interest with the learning-how-to-learn concept is coming from the following sources:

1. long overdue acceptance of education as a lifelong process
 2. a shift from a preoccupation with teaching to a preoccupation with learning
 3. proliferation of approaches and techniques for providing adult education
 4. persistent interests in the notion of learning styles
 5. increased research into self-planning learning
- (p. 18)

There exists no single conceptual framework or no single basic set of assumptions and principles from which all educators view the field of adult education (Darkenwald

& Merriam, 1982, p. 35). It is unlikely that there will ever be a single theory of adult education. Instead, there will be many theories useful in improving the understanding of adults as learners (Cross, 1981, p. 112; Darkenwald & Merriam, 1982, p. 35).

Society is placing significant demands on adults particularly in the aspect of the need for continuous learning throughout a lifetime. No amount of education during youth can prepare adults to meet the demands that will be made on them throughout their lifetime (Cross, 1981, p. 2). Hence, adult learning will need to become an accepted norm in society and indeed may already have been achieved.

Learning Strategies

Learners approach learning tasks in different ways, and the techniques they select to accomplish a task often have significant influence on the eventual success or failure of the learning activity (Fellenz & Conti, 1993, p. 3). One of the major characteristics of adult learning is that it is generally undertaken with the desire for immediate application in real-life situations (Conti & Fellenz, 1991, p. 64). "The methods that adults employ to learn a subject or skill vary greatly, presenting a sharp contrast to the

relatively uniform techniques used in the schooling of children" (Darkenwald & Merriam, 1982, p. 128).

Much research has been done to try to explain how learners are different with a focus on such things as intelligence and learning styles, but it has failed to reveal information useful in the teaching-learning transaction. Learning strategies have recently begun to be researched and have been found to explain some of the differences between learners. Several researchers have investigated and contributed to the use of learning strategies (Mayer, 1988; McKeachie, 1988; Weinstein, 1988). Weinstein (1988) and McKeachie (1988) have focused mainly on learning strategies used in traditional higher educational settings. However, what is new with the current interest in learning strategies is that it can be based on an emerging cognitive theory of human learning and memory (Mayer, 1988, p. 21). Rather than focusing on skills used predominantly in academic settings such as note taking and test passing, learning strategies for adults tend to focus on solving actual problems) encountered in real life (Conti & Fellenz, 1991, p. 64). This is important because there are many differences between learning for everyday problems and learning for academic situations (Sternberg, 1990).

Learning strategies are "the techniques or skills that an individual elects to use in order to accomplish a learning task" (Fellenz & Conti, 1993, p. 1). Learning strategies are different from learning styles in that learning styles are "cognitive, affective, and physiological traits that serve as relatively stable indicators of how learners perceive, interact, and respond to the learning environment" (Keefe, 1982, p. 44). Learning strategies and learning styles are different and reveal different information about an individual. Learning strategies are not stable across all learning tasks. Unlike learning styles, learning strategies are situational and contextual. Learning strategies are often so customary to the learner that they are given little thought. However on some occasions, a learner may deliberately select a desired learning strategy (Fellenz & Conti, 1993, p. 1). Additionally, the strategies an individual uses are constantly being developed and refined as they experience new learning situations (Fellenz & Conti, 1993).

Recognition of the importance of real-life learning and the significance of learning strategies led to interest in developing an instrument to assess an individuals learning strategies (Conti & Fellenz, 1991). Since no instrument existed to measure adult learning strategies, the Self-

Knowledge Instrument for Lifelong Learning Skills (SKILLS) was developed to measure individual learning. SKILLS is a valid and reliable instrument consisting of real-life learning scenarios with responses from each of the five areas of learning strategies. The five areas of learning strategies in SKILLS are metacognition, metamotivation, memory, critical thinking, and resource management (p. 65). Each of these five areas consists of three individual learning strategies (Fellenz & Conti, 1989 p. 4). SKILLS focuses on the role of learning strategies used in real-life learning situations by adults. "The phrase real-life learning has been used to distinguish typical adult learning from the academic learning of formal situations that is usually spoken of as studying or educating" (Fellenz & Conti, 1993, p. 4).

Metacognition

Flavell (1979) introduced the notion of metacognition defined as "one's knowledge concerning one's cognitive processes" (p. 232). The concept of metacognition was further developed and refined by Brown (1982) to refer to knowledge and control over one's thinking and learning. Generally speaking, metacognition refers to "thinking about

thinking" (Yussen, 1985, p. 253). Smith (1982) concluded that "a central task of learning how to learn is developing awareness of oneself as a learner" (p. 57). "Awareness of oneself as a learner" is a fundamental concept of metacognition.

Metacognition is further broken down into the three strategy areas of planning, monitoring and adjusting. Flavell (1979), Brown (1985), and Sternberg (1986) all contend these processes are interactive and dependent on each other (Counter & Fellenz, 1993, p. 9).

Planning is concerned with an individual's awareness of the best way for one to proceed with a learning task. Metacognitive planning strategies involve such things as planning specific tasks, overviewing the learning activity, focusing on the purpose of the learning, and awareness of one's learning style (Counter & Fellenz, 1993, p. 9).

During the process of learning, various things can happen to interfere with the attention or understanding of the learner, so monitoring becomes an important part of the learning process. Monitoring involves establishing goals for the learning activity, assessing progress toward the goals, and if necessary modifying learning strategies to facilitate achievement of the goals (Weinstein, 1988, p. 294).

Monitoring is useful to learners through checking their

cognitive knowledge, the learning tasks, goals, and strategies in relation to their own abilities and the learning activity (Flavell, 1979). Monitoring strategies include self-testing, comparing progress from previous learning, and checking other resources for information.

Adjusting involves the learners' modifying and revising their learning plans in response to the evaluation of the learning progress by the learners. For successful learning to occur, it often calls for modification of the learning process in response to changes in the learning situations. Metacognitive adjusting strategies include revising one's learning plan, changing learning strategies, restructuring the learning activity to satisfy one's knowledge level, and developing techniques to help match the learning task to one's own personal learning characteristics (Fellenz & Conti, 1993, p. 10).

Metamotivation

Motivation is an obscure concept that has been described and defined from many different philosophical, psychological, and educational stances each of which has a different explanation for human behavior based on the researchers assumptions about people and the factors that

influence their behaviors. Approaches to motivation range from the Behaviorist philosophy which views people as passive and controlled by external factors to the Humanistic philosophy that describes the individual as internally motivated. Metamotivation deals with learner's being aware and understanding of how or why they are motivated to participate or remain in a learning activity. Metamotivation is the awareness of and control over factors that energize and direct one's learning (Fellenz, 1993, p. 12).

Energization is a response to needs that are innate to the learner as well as to those that are acquired through interactions with the environment (Deci & Ryan, 1985, p. 3).

Much research has been done regarding motivation with a primary focus on what motivates people to participate in a learning activity. This is not the same focus from which metamotivation was derived. "Meta" in the term metamotivation identifies the construct specifically as motivation of the individual to learn and distinguishes it from factors relating to reasons for participation in educational programs (Fellenz & Conti, 1993, p. 10). The major strategies related to metamotivation are attention, reward/enjoyment, and confidence.

Attention is essential to deliberate, planned learning. Attention involves the learners abilities being focused on

the material to be learned. Attention is the "arousal of interest in learners, the stimulation of an attitude or inquiry, and the maintenance of attention" (Keller, 1987, p. 1). An individual's desire to give attention to a learning experience is influenced by many factors such as curiosity, previous experience, or recognizing the need to learn. The amount of attention one gives to a learning activity is also affected by a number of different things (Fellenz, 1993, p. 15). Kidd (1973) notes that a high attention level is crucial to successful learning (p. 266). Specific metamotivation attention strategies include setting a time and place for learning, resolving to study the material, and avoiding distractions.

Reward and enjoyment are related factors that include anticipating or recognizing the value to oneself of learning specific material, having fun with the learning, or experiencing satisfaction with the learning activity (Fellenz & Conti, 1993, p. 16). The reward for learning can be a specific goal or a feeling of increased competence or control over an environment. Enjoyment "appears to be a more important motivational factor in real-life learning than in formal learning situations where external motivators such as grades or certificates often dominate" (Fellenz & Conti, 1993, p. 16). Learners typically find it difficult to

participate in a learning activity when neither the process or outcome are enjoyable for the learner. Recognizing the learning as relevant or useful, focusing on the satisfaction of the learning, or taking pride in the results of an activity are included as metamotivational reward/enjoyment strategies.

Confidence in one's ability to learn is one of the essential elements in motivation (Keller, 1987 p. 6). Self-efficacy is also an essential element in motivation to learn (McCombs, 1988, p. 142). Learners expected achievement has been found to consistently correlate with actual achievement of adult students (Fellenz & Conti, 1993, p. 16). Those who evaluate themselves negatively are less likely to expect success (Rubenson, 1977). Learning strategies associated with metamotivation confidence are reminding oneself of past success in learning and reassurance of one's capability.

Memory

Memory is "the capacity of humans to retain information, to recall it when needed and recognize its familiarity when they later see it or hear it again" (Wingfield & Byrnes, 1981, p. 4). An immense amount of research has been done on human memory. However, much of

this research involved such things as remembering lists of words or pairing nonsense syllables. "What we want to know, I think, is how people use their past experiences in meeting the present and future. We would like to understand how this happens under natural conditions" (Neisser, 1982, p. 12). It is clear that memory and learning are closely tied concepts because "one who does not learn has nothing to remember, and without memory there is no evidence of memory" (Long, 1983, p. 58).

To understand the effect of memory on real-life learning, it is important to be aware of the memory process, memory structures, and factors influencing memory. Memory processes are the mental activities that store and retrieve information and include acquisition, retention, and retrieval. All of these elements are critical for a learning experience to become useful to the learner because without acquisition there can be no retrieval, and without retention the memory is lost. Memory structures refer to how information is represented, how long it will last, and how memories are organized. Short-term memory, long-term memory, episodic memory, and semantic memory are important in the consideration of memory structure. There are a number of factors that can influence how well one's memory retains what was learned such as emotional involvement with the

material, relationship of the material to previous experience, the context of other events in which the learning occurred, and the events that followed the learning (Mezirow, 1991, p. 29). Events that are related meaningfully to what one already knows are remembered much longer than a list of nonsense syllables (Wingfield & Byrnes, 1981).

Memory strategies include metamemory, mnemonics, and imaging and can be categorized as either external or internal. "Metamemory is practical knowledge acquired about our own memory capacities and what we must do to remember; or simply, what people know about how they remember" (Paul & Fellenz, 1993, p. 22). Learners can improve their learning efficiency and improve their memory performance by developing metamemory skills. Difficulties encountered in learning may not be due to the inability of the learner but rather may be the result of not using the appropriate memory strategy for the learning task (Wingfield & Byrnes, 1981). External strategies involve interaction and manipulation of the environment to ensure recall with such techniques as keeping a list or asking someone for a reminder of something. Internal strategies involve the individual's own thought processes such as repetition, mnemonics, organization of information into related categories, and

visualization. The memory strategies associated with adult real-life learning and used in the SKILLS are organization, external aids, and memory application.

Organization refers to the manner in which the memory restructures information from that in which it was originally presented (Seamon, 1980). The most effective techniques involve organization of the information into frameworks that can improve future retrieval (Paul & Fellenz, 1993, p. 21). Semantic networks in the memory allow relevant pieces of information to be linked together. Organization learning strategies used in SKILLS include several activities used to process information so that material will be better stored, retained, and retrieved such as chunking, mnemonics, creating patterns, elaborating, and comparing.

External aids rely on the learner manipulating the environment to reinforce memory and improve learning. The SKILLS instruments external aids strategies involve the learner controlling the environment in some manner to enhance recall. External aids include the use of appointment books, making lists of things to do, placing visual items on display, and asking others for a reminder to do something.

Thinking about how the learned information will be used can improve learning. If the information is meaningful to

the learner through a relationship to previous learning or the learner's objectives or if the learning has some practical utility, then learning retention will be improved (Paul & Fellenz, 1993, p. 22). Strategies related to application of memory involve the use of those internal strategies involved in memory organization for the purpose of planning, completing, and evaluating learning. Application can be used in a range of learning activities such as acquiring a new skill to developing new knowledge (p. 25).

Critical Thinking

Because of the extensive research regarding critical thinking, there are many definitions of this concept. Critical thinking is a popular topic today not only in the classroom but also to those interested in developing human potential. The renewed interest in critical thinking is characterized by application to real-life situations (Fellenz & Conti, 1989, p. 11). Whether from a philosophical, educational, or psychological viewpoint, most attempts at defining critical thinking have centered around processes that involve higher-order thinking skills (Fellenz, 1993, p. 29).

In the Information Age, society has placed increased value on critical thinking skills. Constant change in many aspects of life and increasing complexity of the social structures produce many opportunities for critical thinking (Fellenz, 1993, p. 30). What is central to adult learning is using high-order thinking skills to examine prior learning in order to determine whether what is currently being learned seems appropriate (Mezirow, 1990, p. 5).

The SKILLS model of critical thinking strategies is based on four components that were outlined by Brookfield (1987) in *Developing Critical Thinkers* and that were developed from real-life situations. The four components are (a) identifying and challenging assumptions, (b) challenging the importance of concepts, (c) imagining and exploring alternatives, and (d) reflective skepticism. The critical thinking strategies used in SKILLS, based on these components, include testing assumptions, generating alternatives, and conditional acceptance of general knowledge.

Testing assumptions refers to identifying the assumptions of the learning and challenging them by examining their accuracy and asking questions. "The process of challenging assumptions presumes the ability to identify these assumptions and the willingness to examine them".

(Fellenz, 1993, p. 31). Brookfield (1987) contends that "to challenge an assumption that until now has been accepted uncritically... is at the heart of critical thinking" (p. 90). The testing assumptions strategies used in the SKILLS instrument "invite respondents to examine the accuracy or the acceptance uncritically given to an assumption while others prompt them to identify relationships, spot inconsistencies, or question value sets" (Fellenz, 1993, p. 32).

Generating alternatives is essential to coming up with new ideas and new insights. Unlike well-structured, classroom-generated problems, real-life problems are complex and have many potential solutions, and exploring all alternatives is vital to coming up with the best potential solutions (Fellenz, 1993, p. 32). Brainstorming is probably the most widely known and most effective method of generating alternatives because of its uncritical acceptance of creative ideas. Specific generating alternative strategies used in the SKILLS instrument include brainstorming, ranking alternatives, and envisioning the future.

Conditional acceptance, also referred to as reflective skepticism, is not accepting anything only on authority and questioning absolutes and oversimplifications. This involves

"considering and imagining leads to the development of a particularly critical cast of mind, especially where any claims for universal truth or validity of ideas or practice are concerned" (Brookfield, 1987, pp. 20-21). As adults mature, they move from a state in which knowledge is perceived as absolute to the acceptance of multiple realities and an understanding that careful searching can sometimes lead to better answers. Conditional acceptance strategies used in the SKILLS instrument include questioning of simplistic answers, predicting consequences, and monitoring results.

Resource Management

Resource management strategies are those ways that a learner manages learning resources, identifies appropriate resources, critically assesses the resources, and uses human resources (Yabui, 1993, p. 29). In the Information Age, the availability of different types of resources and the volume of information from resources is growing at a phenomenal rate. For many learners, locating effective resources is a critical factor in the completion of a successful learning activity. Gathering information from a variety of resources, checking the accuracy of information, and acting upon the

information have a significant impact upon learning (Conti & Fellenz, 1991, p. 68).

Some may find the local library a great resource with its newspapers, magazines, and books although fewer than 25% of American adults use the library regularly (Shirk, 1983). Some adults may prefer other sources of information such as the television or computerized resources while others feel the best sources of information are their friends and neighbors. Where and how people seek out information provides important information about them as learners (Fellenz, 1993, p. 35).

Adults rely strongly on their past experience in determining their present behavior which could significantly affect their choice of learning strategies (Paul & Fellenz, 1993, p. 18). Very few adults actually use resources such as television or radio, and only a small fraction prefer such methods (Darkenwald & Merriam, 1982, p. 128). Those who grew up without technology may not see the value of information contained on a computer or on the other side of the world. Conversely, those who grew up in the Information Age may not be inclined to turn to their neighbor as a potential source of information. Ingrained habits of thinking and behavior make it difficult for adults to adjust to using new information resources (Fellenz, 1993, p. 36); this may lead

to frustration and abandonment of the learning activity. With training on the proper use of modern resources and on not so modern resources, the learning activity has greater potential for success. Learning strategy areas for resource management in SKILLS include identification of resources, critical use of resources, and human resources.

In general, adults are not well equipped to use information resources associated with technology (Shadden & Raiford, 1984). Shirk (1983) revealed that adults prefer to use their own books, neighbors, and friends more than any other resource despite the fact they found these resources to be somewhat lacking in effectiveness. Identifying appropriate resources for a learning activity includes both an awareness of appropriate and available resources and a willingness to use them.

Tough (1971) found that adults spend much time, money, and effort in locating and using human and material resources that sometimes were not beneficial to the learner. In the age of information growth, one problem adults typically encounter is information overload; in other words, finding more information than they know what to do with (Smith, 1982, p. 103). Additionally, there is a tendency to use patterns of thinking or behavior that have been successful in the past though they may not be useful at the

present. In an age of rapid change, adults need to be able to identify the most current information, recognize potential bias coming from the source of the information, and realize that everything in print may not always be accurate (Fellenz, 1993, p. 36).

People and the social environment have a significant impact on learning. Learning involves listening to people with different opinions, discussing with people from a variety of backgrounds in order to examine an issue, and recognizing the importance of moral support from other people as an aid to successful learning (Fellenz, 1993, p. 37).

CHAPTER 3

METHODOLOGY

Introduction

This descriptive case study investigated the relationship between learning strategies used by advertising salespeople working for Montana newspapers, television stations, and radio stations. It utilized the Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) and two multivariate statistical techniques. Discriminant analysis was used to study the relationship between learning strategies and selected demographic characteristics of those in the study. Cluster analysis was used to identify distinct groups of learners within the sample. These groups were then compared to previously identified groups of learners in research projects using SKILLS.

The study design was that of case study descriptive research. Descriptive research "involves collecting data in order to test hypotheses or answer questions concerning the current status of the subject of the study" (Gay, 1996, p.

14). Descriptive data are "typically collected through a questionnaire survey, an interview, or observation" (p. 14). A case study is a "bounded system which is an examination of a specific phenomenon such as a program, an event, a process, a situation, or a social group" (Merriam, 1988, p. 10). The study involved a social group comprised of full-time advertising salespeople working at newspapers, television stations, and radio stations in the major markets of Montana. Therefore, participants in this case study were the advertising salespeople working at these businesses.

The advertising salespeople were given a modified version of the SKILLS learning strategies instrument and a biographical survey. The SKILLS instrument was used to measure the learning strategies used in professional selling situations and to gather information on certain demographic variables. Results from the learning strategies instrument were also used to generate distinct clusters of learners.

Sample

The population for this study were advertising salespeople in the major media markets of Montana. Major media markets are cities in which the primary advertising vehicles, e.g., television and newspaper, reach the

majority of people when compared to other cities. In Montana these markets are Billings, Great Falls-Helena, Missoula-Kalispell, and Butte-Bozeman. The markets were chosen based on Nielsen Research's grouping of television advertising markets known as Dominant Market Area (DMA).

Nielsen groups markets based on county viewing habits. A county is assigned to a DMA based on the television stations people watch and where they are located. The three television stations in Great Falls and the single station in Helena, for instance, are the dominate television stations in 14 Montana counties. Consequently, these counties are assigned to the Great Falls DMA. The Billings DMA consists of 14 counties in southeastern Montana. The Butte-Bozeman DMA is made up of 9 counties. Finally, the Missoula-Kalispell DMA covers 9 counties. Together, these four DMAs contain 90% of the people in Montana.

Since advertisers often buy all of their media based on the television DMA, this research report used comparable radio stations in the same cities as the television stations. The major daily newspapers in the state are also located in these cities.

The television stations in each DMA are as follows:
Billings--KHMT/KSVI-TV, KULR-TV, KTVQ, Butte-Bozeman--
KCTZ/KXLF, KTVM, KWYB, Great Falls-Helena--KRTV, KFBB-TV,

KTVH-TV, KTGF-TV, and Missoula-Kalispell--KCFW/KECI-TV, KPAX-TV, KTMF-TV. The radio companies situated in the DMA regions included: Billings--Citadel Broadcasting, Sunbrook Communications, and One-on-One Radio, Inc.; Bozeman-Butte--Reir Broadcasting, Gilbert Broadcasting, Sunbrook Communications; Great Falls-Helena--StaRadio, Sunbrook Communications, and KEIN, Inc.; Missoula-Kalispell--Sunbrook Communications, Bee Broadcasting, and Western Broadcasting. Newspapers located in the DMA markets consisted of: Billings--The Billings Gazette, Butte-Bozeman--The Montana Standard and The Daily Chronicle, Great Falls-Helena--The Great Falls Tribune and The Independent Record; and Missoula-Kalispell--The Missoulian and The Daily Interlake.

In descriptive research, "the general guideline is to sample 10 to 20% of the population" (Gay, 1996, p. 124). In this study, participation levels were as follows: Newspapers--3 of 7 (43%), television--11 of 13 (85%), and radio--4 of 15 (26%). The number of people with each company who completed the survey are listed in Table 1.

The lower response in radio probably resulted from several factors. One factor pertains to the high turnover rate of salespeople in radio. Radio usually has the lowest share of advertising revenue in each market. Consequently, not every salesperson is able to make a comfortable living

selling radio advertising. Furthermore, the radio industry was recently deregulated by the Federal Communications Commission. The effect of deregulation has seen substantial numbers of mergers and consolidations. Radio salespeople often find they are teamed up with people who were competitors just the day before.

One example of this turmoil came during the explanation of the SKILLS survey to the sales manager of Citadel Broadcasting in Billings. The sales manager was anxious to return to work because he had gotten word that the company just completed the acquisition of 60 stations throughout the country. The Citadel management was very interested in the outcome of the research so they completed the SKILLS survey. Other sales managers were not as interested in completing the survey or even in listening to the specifics of what the survey was trying to accomplish.

Skills

The instrument used for determining learning strategies was a modified version of the Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS). The original form of the SKILLS instrument consists of six scenarios which the

Table 1 Source of Participant Responses to SKILLS.

Company	Completed SKILLS
Newspapers	
The Billings Gazette	5
The Montana Standard	5
The Daily Interlake	4
Total Newspaper	14
Television	
MTN (KRTV, KTVQ, KXLF, KPAX, KCTZ, KAJ)	19
Fox/ABC Billings	6
KFBB, Great Falls	2
Eagle Broadcasting (KECI, KTVM, KCFW)	11
Continental	11
Broadcasting (KWYB, KTGF, KTMF)	
KTVH, Helena	3
Total Television	52
Radio Companies	
StaRadio (Great Falls/Helena)	2
Citadel Broadcasting Co. (Billings)	19
Sunbrook Broadcasting (Great Falls)	5
Reir Broadcasting Co. (Bozeman)	5
Total Radio	31
Grand Total	91

participants may encounter in their real life (Conti & Fellenz, 1991). From these six scenarios, participants select four which are most meaningful to them. Each scenario requires the participant to rate 15 possible responses to the scenario. The possible responses include learning strategies in the five areas of Metacognition, Metamotivation, Memory, Critical Thinking, and Resource Management. Three choices are available for each response:

Definitely Would Use, Possibly Use, or Definitely Not Use.

Each of the five areas and the three specific learning strategies are outlined as follows.

Metacognition

Definition: Knowing about and directing one's own thinking and learning processes.

Strategies:

Planning--analyzing the best way for one's self to proceed with a specific learning task. Examples: Follow own learning style, skim or overview, determine purpose or focus, plan.

Monitoring--assessing how one is proceeding through a learning project. Examples: Review plans, check if on task, compare to accepted standard or model.

Adjusting--directing and improving one's learning processes. Examples: Evaluate, seek feedback, change approach, decide when done.

Metamotivation

Definition: Awareness of and control over factors that energize and direct (motivate) our learning.

Strategies:

Attention--focusing on material to be learned. Examples: Set aside time for learning, resolve to learn, avoid distractions.

Reward/Enjoyment--anticipating or recognizing the value to one's self of learning specific material. Examples: Recognizing learning as relevant or useful, important or worthwhile, problems of not knowing.

Confidence--believing that one can complete the learning task successfully.

Examples: Feel confident or reassured, remind self of past success, get support from.

Memory

Definition: The storage, retention, and retrieval of knowledge.

Strategies:

Organization--structuring or processing information so that material will be better stored, retained, and retrieved. Examples: Elaborate or translate; image, check, pattern, summarize, or fit together, memory devices.

Using External Aids--using external aids to reinforce memory. Examples: Write down or list, put or display, ask another to remind.

Memory Application--using remembrances, mental images, or other memories to facilitate planning or problem-solving. Examples: To avoid mistakes, to know what to expect, to select methods, to provide background information.

Critical Thinking

Definition: A reflective thinking process utilizing higher order thinking skills in order to improve learning.

Strategies:

Testing Assumptions--recognize and evaluate in relation to learning situation. Examples: Examine accuracy of assumptions, identify relationships, spot inconsistencies, critical acceptance, questioning value sets.

Generating Alternatives--hypothesize but ground options within the given situation. Examples: Brainstorm or envision future, hypothesize, rank order, identify other solutions.

Conditional Acceptance--reflective and tentative maintenance of principles. Examples: Question simplistic answers, monitor or evaluate results, predict consequences.

Resource Management

Definition: The process of identification, evaluation, and use of resources relevant to the learning task.

Strategies:

Identification of Resources--knowing how to locate/use best sources of information. Examples: Modern information sources, print sources, people or models, professional or agencies.

Critical Use of Resources--using appropriate rather than available resources while recognizing their limitations. Examples: Contact expert or outsider, check second source, observe or ask to check bias.

Using Human Resources--integrating others into the social and political process of knowing. Examples: Dialogue or discuss, check opinions, listen to all, support from or network with others.

Source: Fellenz, R. A., & Conti, G. J. (1993). *Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) Manual*. Bozeman, MT: Montana State University Kellogg Center for Adult Learning.

SKILLS has been tested and proven to be both a valid and reliable instrument (Conti & Fellenz, 1991). Validity of the instrument was established on the basis of construct and content validity. Construct validity assesses whether the instrument can be shown to measure hypothetical constructs which explain some aspect of human behavior (Borg & Gall, 1983). Construct validity was established through literature reviews and obtaining judgment from adult education and educational psychology professors (Conti & Fellenz, 1991). Content validity refers to the sampling adequacy of the content of the instrument. Content validity was assessed for

SKILLS on the basis of sampling validity and item validity. Content sampling validity was assessed in terms of the degree to which the items were representative of the learning strategies used by adults. Content item validity was assessed by determining whether adults responded in meaningful patterns to the items on the instrument. Both sampling and item validity were established (Conti & Fellenz, 1991).

Reliability refers to the stability of an individual's response over time and consistency within the instrument. SKILLS provides the participants with 6 scenarios composed of 15 similar types of responses. Each scenario provides responses similar to the other scenarios and was used to establish reliability within the instrument. The reliability of SKILLS was established by comparing the results of participants' responses using a coefficient of equivalence (Conti & Fellenz, 1991).

The basic model for the six SKILLS scenarios focuses primarily upon personal life skills. Because this study focused on professional skills used by advertising salespeople in Montana, the scenarios were modified to develop situations that are directed to reflect the actual learning activities faced by the advertising salespeople on the job. Modification of the basic SKILLS scenarios was done

and recommended previously by Gehring (1997), Bighorn (1997), Korinek (1997), Lockwood (1997), McKenna (1991), and Strakal (1995). While the scenarios of the instrument may change, the validity and reliability are not affected as the basic structure of the instrument is held in tact (McKenna & Conti, 1994). When the scenarios are modified to reflect the actual situation of the participants, four scenarios are used instead of six (e.g., Strakal, 1995). Therefore, the participants were presented with the four scenarios in the Appendix.

Additional demographic and personal information was gathered from the participants using a biographical data sheet. This data sheet requested age; gender; level of formal education; years in media sales; type of media worked in; level of sales training; position held such as salesperson or sales manager; and personal satisfaction with reaching financial, sales, and personal goals.

Procedures for Data Collection

Data were collected by administering SKILLS to a representative sample of advertising salespeople within the selected media markets in Montana. Permission to conduct the survey was obtained from the general manager for each media

company. All salespeople in each newspaper, television, or radio station where the management approved were invited to participate on a volunteer basis and could remain anonymous if they chose. Those selecting to provide their name received a copy of their individual SKILLS results.

Contact was made with each media company either by phone or letter to explain the nature of the study and inquire about the company's interest in participating in the study as well as determine the most appropriate person with whom to coordinate the data collection process. Once this person was selected, a face-to-face discussion or telephone discussion was conducted to further explain the study and answer any questions. Because of the unique nature of management of salespeople at each media company, it was left up to the person coordinating at each station to determine the most appropriate procedure for distributing and collecting the completed surveys. For the most part, managers either distributed the surveys at a sales meeting or through the company's mail system. The mail system was always used when a manager was in charge of several locations.

To help standardize the completion of SKILLS, the instructions for completing SKILLS were included at the top of the answer sheet. The salespeople were informed that

there were four sales-related scenarios to be completed. They were then asked to rate the 15 responses provided for each scenario and record their responses on the SKILLS answer sheet.

Demographic and personal information was gathered from the employees at the same time as the completion of the SKILLS instrument. Once completed, the SKILLS survey and data sheet were returned for inclusion in the study.

Statistical Analysis

Data collected from SKILLS and from the data sheets were entered into dBase III Plus, a data management software program used for data organization and analysis. The Statistical Package for Social Sciences (SPSS), a computer statistics program, was used to analyze the statistical data.

In addition to descriptive statistics, the data were evaluated using discriminant analysis and then cluster analysis. Discriminant analysis was used to investigate the relationship between learning strategies and the information gathered on the data sheet. Discriminant analysis is a statistical technique which allows the investigation of the differences between two or more groups in relationship to

several variables simultaneously (Klecka, 1980; p. 7). Discriminant analysis is a process that examines "people on a set of variables to determine if any of them interact in a combination that can explain the person's placement in the group" (Conti, 1993, p. 91). This technique is useful when known and distinct groups exist (Gay, 1996) on such variables as gender and age.

In addition, cluster analysis was used to determine if distinct groups existed based upon the participants' uses of particular SKILLS learning strategies.

Cluster analysis is a powerful, multivariate tool available to adult educators for inductively identifying groups which inherently exist in the data. Its power lies in its ability to examine the person in a holistic manner rather than as a set of unrelated variables. (Conti, 1996, p. 67)

Once clusters were identified, other qualitative and quantitative techniques were used to help name and describe the clusters. (cf. Bighorn, 1997; Ghering, 1997; Hays, 1995; Kolody, 1997; Korinek, 1997; Lockwood, 1997; Strakal, 1995) Analysis of variance was conducted to determine which variables were related to each cluster and for determining how the variables were associated with the cluster. Means for each of the 15 learning strategies in SKILLS were calculated for each cluster group. A one-way analysis of variance was conducted for each of the 15 variables to

determine if there were significant differences among the five clusters. Variables on which the groups differed significantly were retained in the analysis to assist in naming the groups and for comparison to previous SKILLS related studies.

As a result of past studies on learning strategies (Bighorn, 1997, Conti & Fellenz, 1989; Conti & Kolody, 1995; Hays, 1995; Kolody, 1997; Korinek, 1997; Lockwood, 1997; Strakal, 1995; Yabui, 1993), a triangulation process has been developed for interpreting cluster compositions. Triangulation is testing one source against another to satisfy validity of interpretation (Guba, 1978). This process involves using the existing quantitative data and gathering additional qualitative data (Conti, 1996, p. 70) to further validate the quantitative data. The cluster information from this SKILLS study was compared against conclusions reached in other studies using SKILLS.

CHAPTER 4

QUANTITATIVE ANALYSIS

This study used the SKILLS instrument to measure learning strategies of advertising salespeople. The results of surveying these salespeople were analyzed with a combination of descriptive statistics, , discriminate analysis, cluster analysis and analysis of variance.

Profile of the Participants

The sample for the study included 91 advertising salespeople from major Montana media organizations. These organizations included three newspapers, 16 television stations, and 4 radio companies. The Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) was used to measure the learning strategies of the participants in the study. The SKILLS instrument was comprised of four workplace-related scenarios that were completed by all participants. In addition, demographic information was gathered using a data sheet that was also completed by the participants in conjunction with the SKILLS instrument.

Ages of the participants ranged from 23 to 60 with a mean age of 37.9, and almost two-thirds of the participants were between 28-47 years of age (see Table 2). Females represented 57.1% (52) of the sample. A total of 86.8% (79) attended a post-secondary institution, and 53.2% (49) of the group completed a degree (see Table 3). The average number of years working in media was 8.7 years. One third of the respondents had worked in media sales for two years or less. The high average age and the high number of salespeople who have been in the business a short time could indicate a high turnover rate of people entering and leaving the industry.

Table 2. Age Distribution of Participants.

Age Grouping	Frequency	Percent	Cumulative Percent
20-29	23	26	26
30-39	28	31	57
40-49	30	33	90
50-64	9	10	100

Table 3. Education and Distribution of Participants.

Educational Level	Frequency	Percent	Cumulative Percent
High School	12	13	13
College (no degree)	30	33	46
2 year degree	4	4	50
4 year college grad	36	40	90
Graduate School	8	8	100

Scores for SKILLS are calculated by totaling the points received for each response on the four scenarios.

Respondents receive three points for each learning strategy that they would Definitely Use, two points for each strategy they would Possibly Use, and one point for each strategy they would Not Likely Use. Within each of the four scenarios, each learning strategy area is represented by three individual learning strategies. Therefore, the range of total possible scores for each individual learning strategy is 4 to 12 points, and the range of possible scores for each learning strategy area is 12 to 36 points.

The overall profile for the salespeople across all media revealed a divergent group of learners. Most scores clustered around the middle of the range which is 24 (see Table 4). Resource Management and Critical Thinking were the most commonly used learning strategy areas at a rounded score of 25. These scores indicate a moderately strong preference for use of the Resource Management learning strategies as well as Critical Thinking strategies. Resource Management did have a larger standard deviation, but only .61. Metacognition was the least commonly used learning strategy area by the salespeople; it was 1.5 points below the midrange and 2.68 points below Resource Management.

Each of the five learning strategy areas are comprised of three individual learning strategies, totaling 15 individual learning strategies. The distribution of scores,

which had a range of 4-12, revealed some moderately strong preferences for some strategies and weak uses for other strategies. The Critical Thinking learning strategy of Generating Alternatives, the Resource Management learning strategy of Identification of Resources, and the Memory learning strategy of External Aids, were substantially more preferred (see Table 5). The Memory strategies of Organization, Memory Application, the Metamotivation learning strategies of Reward and Confidence, and the Critical Thinking learning strategy of Testing Assumptions were the least preferred by the participants. The overall difference between the highest and lowest mean was 3.24. This was 40.4% of the possible range of 8 points. Overall, this indicated some tendencies for learning strategy preferences on the part of these learners in workplace situations.

Table 4. Means of Learning Strategies.

Learning Strategy Areas	Mean	SD	Range
Resource Management	25.23	3.28	18-32
Critical Thinking	24.95	2.67	19-32
Metamotivation	23.62	3.45	16-31
Memory	23.51	2.75	16-31
Metacognition	22.58	2.60	17-29

Table 5. Means of Individual Learning Strategies.

Learning Strategy	Mean	SD	Range
Generate Alternatives	9.52	1.70	4-12
Planning	8.99	1.75	5-12

Attention	8.97	1.75	4-12
Identification of Resources	8.46	1.63	5-12
External Aids	8.44	1.86	4-12
Critical Use of Resources	8.42	1.75	4-12
Testing Assumptions	8.41	1.55	5-12
Use of Human Resources	8.35	2.08	4-12
Organization	8.08	1.84	4-12
Confidence	7.70	2.04	4-12
Adjusting	7.19	1.26	5-10
Conditional Acceptance	7.02	1.52	4-11
Memory Application	6.99	1.55	4-11
Reward	6.96	1.80	4-11
Monitoring	6.41	1.49	4-11

Discriminant Analysis

Discriminant analysis is a statistical technique that investigates the difference between two or more groups in relationship to several variables simultaneously (Klecka, 1980, p. 7). Discriminant analysis analyzes the variables holistically rather than singly. The purpose of this kind of technique is to examine the interaction of multiple variables (Conti, 1993). Discriminant analysis "requires the researcher to make meaningful decisions about the data and to impose sense upon it" (p. 90) such as separating groups by gender, age, or other known characteristic. Discriminant analysis can be used either to describe the difference between groups or to predict membership in a group. In this descriptive study, discriminant analysis was used to determine if learning strategies could be used to determine

how groups differed. The participants were grouped according to gender, age, post-secondary attendance, educational credential, and years in current position.

Two criteria were used to evaluate whether it was possible to discriminate between those in the groups related to their learning strategies. The first criterion was that the discriminant function had to correctly classify at least one-half of the cases beyond the chance placement. The second criterion was that the discriminant function had to be describable using the structure coefficients with a value of .3 or greater (Conti, 1993, p. 93; Kolody, 1997, p. 69).

Discriminant analysis produces a discriminant function that is used to predict placement in the groups even though the accuracy of the discriminant function may not be accurate. The researcher has to have criteria for determining if the function can be judged as useful. The first criterion requires the discriminant function to correctly classify a certain percentage of the cases beyond chance. "The percentage of cases classified correctly is often taken as an index of the effectiveness of the discriminant function. When evaluating this measure it is important to compare observed misclassification rate to that expected by chance alone" (Norusis, 1988, p. B-13). Chance refers to the probability of a person randomly being placed

in the correct group. The probability of correct placement in a group, or classification rate, is equally spread across the groups and is expressed as a percentage. For this study, the criterion was that in order for the discriminant function to be judged useful, it had to correctly classify not only that equivalent to chance but also 50% of the additional chance remaining (Kolody, 1997, p. 69). For example, in a two-group analysis, there is a 50% chance of correctly placing a case without analyzing any characteristics of the case. In this example, to be considered useful the discriminant function would have to correctly classify 75% of the cases, which is the 50% due to chance plus an additional 25% which is half of the chance remaining. A three-group analysis would require a correct classification rate of 66%, or 33% plus 50% of the remaining 67%.

The second criterion used in the study involved examining the structure matrix produced in the discriminant analysis. The structure matrix shows the correlation between the individual discriminating variables and discriminant function (Klecka, 1990, p. 31). This additional criteria was necessary because it is possible to get a discriminant function with a high placement rate but which correlates with so many variables that it is impossible to decipher the

meaning of the function (Hill, 1992). This criterion required that the discriminant function have clarity in order to be judged useful.

Gender

Discriminant analysis was used to determine if the learning strategies of the participants could be used to distinguish learners when grouped on gender. The set of discriminating variables used to predict placement in these groups were the 15 learning strategies from SKILLS. These variables were Metacognition--Planning, Monitoring, and Adjusting; Metamotivation--Attention, Reward/Enjoyment, and Confidence; Memory Organization, Using External Aids, and Memory Application; Critical Thinking--Testing Assumptions, Generating Alternatives, and Conditional Acceptance; and Resource Management--Identification of Resources, Critical Use of Resources, and Use of Human Resources.

The pooled within-groups correlation matrix indicates the correlation for the variables with the participants placed in their appropriate group. The pooled within-groups correlation matrix of discriminating variables was examined to detect dependencies among the variables. In order for multiple variables to be included in an analysis, they

should not be sharing variance; a high correlation indicates that variables are accounting for the same variance. The within-groups matrix reveals how the discriminant function is related to the variables within each group in the analysis. The examination of the 105 coefficients for this analysis revealed all below the .14 level and most below the .2 level.

Stepwise selection was used to determine which variables added the most to the discrimination between genders because this method produced an optimal set of discriminating variables. Wilks's lambda was chosen as the method for selecting variables because it takes into consideration both differences between the groups as well as the cohesiveness within the groups. Because of its approach to variable selection, Wilks's Lambda is commonly used in discriminant analysis in education. As a result of this stepwise procedure, eight variables and their corresponding Wilks's lambda values were selected: Planning (.2), Adjusting(.79), Reward(.84), Confidence(.80), Testing Assumptions(.82), Identification of Resources (.84), and Critical Use of Resources(.80) and Use of Human Resources (.79). The other seven variables included in the analysis did not account for enough variance to be included in the discriminant function.

Standardized discriminant function coefficients are used to determine which variables contribute most to the discrimination between the groups. By examining the standardized coefficients, the relative importance of each variable to the discriminant function can be determined. The standardized coefficients for this function which discriminated based on gender were Planning (.52), Adjusting(-.37), Reward(-.74), Confidence(-.42), Assumptions(.48), Identification of Resources(.64), Use of Resources(.35), and Use of Human Resources (.32).

The percentage of cases correctly classified shows how accurate the discriminant function was in placement of the cases in the appropriate group. This discriminant function was accurate in correctly classifying 67.8% of the cases. It correctly placed 65.1% (41) of the males and 68.7% (136) of the females. Although the discriminant function is a 17.8% improvement over chance in predicting group placement, it does not meet the required placement percentage criterion, which in this case is 75%. Consequently, it demonstrates that males and females cannot be distinguished on the basis of their preference for particular learning strategies in the workplace.

The discriminant function which was used to classify the cases is:

$$D = .30 \text{ (Planning)} - .22 \text{ (Adjusting)} + .41 \text{ (Reward/Enjoyment)} - .21 \text{ (Confidence)} + .32 \text{ (Testing Assumptions)} - .39 \text{ (Identification of Resources)} + .19 \text{ (Use of Human Resources)} + .15 \text{ (Critical Use of Resources)} - 4.7.$$

The group centroid for males was .62 and -.44 for the females. The canonical correlation is a measure of the degree of association between the discriminant scores and the groups. For this analysis, the canonical correlation was .47, and when squared, this value indicates that the grouping only explained 22% of the variation in the discriminant function.

The structure matrix contains the discriminant function coefficients which show how closely each variable included in the discriminant function and the overall discriminant function are related. The variables with the highest coefficients have the strongest relationship to the discriminant function and are used to name the discriminant function. This structure matrix is extremely important to a descriptive study because it serves the purpose of naming the process that distinguishes the groups from each other. Since the overall purpose of discriminant analysis is to describe the phenomenon that discriminates the groups from each other, this logical process of giving meaning to the discriminant function by interpreting the structure matrix

is central and critical to the whole process. Generally, in order for a variable to be considered significant and to be included in the process of the naming the discriminant function, the coefficient must have a value of at least .3. Three variables had sufficient coefficients to be included in determining the meaning of the discriminant function. They are External Aids (-.30), Identification of Resources (-.45), and Testing Assumptions (.43). Because of the low percentage of variance explained by the discriminant function and because of its lack of accuracy in placing people into the correct group, the discriminant function was not named. Therefore, it was determined that it is not possible to use learning strategies to discriminate between groups categorized according to gender.

Age

Discriminant analysis was used to determine whether employees differed in their use of learning strategies when grouped by age. For the purpose of this analysis, the participants were placed into two groups. One group contained 52 individuals who were age 39 or below, the second group contained 39 individuals who were 40-60 years of age. These age groupings were used because they represent

distinct age groups that have differing types of life experiences. The set of discriminating variables used to predict placement in these groups consisted of the 15 learning strategies found in SKILLS.

The pooled within-groups correlations are the correlations for the variables with the participants placed in their appropriate group. The examination of the 105 coefficients for this analysis revealed all below the .14 level and most below the .2 level. Since these variables were not highly correlated with the other variables these variables were retained in the analysis because they were not sharing a common variance.

Stepwise selection was used to determine which variables added most to the discrimination between the two age groups. As a result of this Wilks's lambda stepwise procedure, 4 variables were included in the discriminant function. The discriminating variables and their corresponding Wilks's lambda values were Planning (.89), Attention (.88), Organization(.90), and Using External Aids (.87). The remaining variables did not account for enough variance to be included in the discriminant function.

Standardized discriminant function coefficients are used to determine which variables contribute most to the discrimination between the groups. The standardized

coefficients for this function which discriminated between the ages were as follows: Planning (.62), Attention (.57), Organization(.71), and UsingExternal Aids(.51).

The percentage of cases correctly classified was 68.1%. The classification correctly placed 65.4% (34) of the cases in the lower age group and 71.8% (68) of the cases in the upper age group. Thus, the discriminant function is a 22.3% improvement over chance in predicting group placement but below the criteria value.

The discriminant function which was used to classify the cases into these groups was as follows:

$$D = .36 (\text{Planning}) + .32 (\text{Attention}) + .39 (\text{Organization}) + .28 (\text{External Aids}) - 11.75.$$

The group centroid for the youngest age group was .37 and .50 for the oldest age group. The groupings explained only 16.3% of the variation in the discriminant function. Because of the low percentage of variance explained by the discriminant function and because of its lack of accuracy in placing people into the correct group, the discriminant function was not named. Therefore, it was determined that it is not possible to use learning strategies to discriminate between groups categorized according to high and low age groups.

Education

Discriminant analysis was used to determine whether employees differed in their use of learning strategies when grouped according to whether or not they had graduated from a 4-year educational institution. The group of those that attended a 4-year institution contained 44 individuals, and the group of those that did not graduate from a 4 year institution contained 45 individuals. There were two individuals who did not provide this information. The set of discriminating variables used to predict placement in these groups consisted of the 15 learning strategies found in SKILLS.

The pooled within-groups correlations are the correlations for the variables with the participants placed in their appropriate group. The examination of the 105 coefficients for this analysis revealed all coefficients were below the .3 level. Thus, the variables in this discriminant analysis were not significantly related to each other and did not share a common variance.

Stepwise selection was used to determine which variables added most to the discrimination between the two groups. As a result of this Wilks's lambda stepwise procedure, no variables were included in the discriminant function. Thus it was not possible to use learning

strategies to discriminate between groups categorized by educational level.

Years in Media Sales

Discriminant analysis was used to determine whether employees differed in their use of learning strategies when grouped based on the number of years working in their current position. For the purpose of this analysis, the participants were placed in two groups. One group contained 46 individuals who had been in media sales 6 years or less, the second group contained 44 individuals who had been in their current position 7-27 years. The set of discriminating variables used to predict placement in these groups consisted of the 15 learning strategies found in SKILLS.

The pooled within-groups correlations are the correlations for the variable with the participants placed in their appropriate group. The examination revealed all below the .3 level. The variables in this discriminant analysis were not significantly related to each other and did not share a common variance.

Stepwise selection was used to determine which variables added most to the discrimination between the two groups. As a result of this Wilks's lambda stepwise

procedure, four variables were included in the discriminant function. The discriminating variables and their corresponding Wilks's lambda values were Adjusting (.85), Attention (.88), Organization (.91) and Critical Use Resources (.85). The remaining 11 variables did not account for enough variance to be included in the discriminant function.

Standardized discriminant function coefficients are used to determine which variables contribute most to the discrimination between the groups. The standardized coefficients for this function which discriminated between those in their current position for a relatively short time and those in their current position for a relatively long time were Adjusting (-.35), Attention (.50), Organization (.76), and Critical Use of Resources (.41).

The percentage of cases correctly classified was 68.5%. The classification placed 64% of the cases in the group with the fewest years in their current position and 72.8% of the cases in the group with the most years in their current position. Thus, the discriminant function is a 18.5% improvement over chance in predicting group placement. This analysis indicates that the number of years in media sales cannot be distinguished on the basis of learners' preference for learning strategies.

The discriminant function which was used to classify the cases into these groups was as follows:

$$D = -.28 (\text{Adjusting}) + .29 (\text{Attention}) + .44 (\text{Organization}) + .25 (\text{Critical Use of Resources}) - 6.16.$$

The group centroid for the group with the fewest years was $-.43$ and $.44$ for the group with the most years of experience. The groupings explained only 16.4% of the variation in the discriminant functions. Because of the low percentage of variance explained by the discriminant function and because of its lack of accuracy in placing people into the correct group, the discriminant function was not named. Therefore, it was determined that it is not possible to use learning strategies to discriminate between groups categorized according experience in media sales.

Cluster Analysis

Cluster analysis was performed on the 91 cases to determine if groups of learners could be identified based on the SKILLS learning strategies. Cluster analysis is a "useful statistical procedure to discover structure in data that is not readily apparent by visual inspection or by appeal to other authority" (Aldenderfer & Blashfield, 1984,

p. 16). A cluster analysis is a powerful multivariate tool available to adult educators for inductively identifying groups which inherently exist in the data. Its power lies in its ability to examine the person in a holistic manner rather than as a set of unrelated variables (Conti, 1996, p. 67).

The Ward's method was used for determining how cases would be combined into clusters. The Ward's method is widely used in the social sciences and was chosen in this study because "it is designed to optimize the minimum variance within clusters and tends to create clusters of relatively equal size" (Aldenderfer & Blashfield, 1984, p. 43).

Several potential cluster solutions were considered for this study. In examining the structure of the cluster, the four cluster solution was determined to be the most appropriate for this data set based on the distribution of participants in each group and the unique characteristics of each group. Though the groups were relatively equal in size, and one group was slightly smaller than the others (see Table 6). The four clusters of adult learners were named Resourcers, Problem Solvers, Architects, and Believers. The names for the clusters were derived from a statistical profile of each group based on the most significant learning strategies for each cluster.

Table 6. Distribution of Participants by Cluster.

Cluster Name	Frequency	Percent
Problem Solvers	27	29.7
Resourcers	25	27.5
Believers	23	25.3
Architects	16	17.6
Total	91	100.0

ANOVA of the Clusters

Analysis of variance (ANOVA) is a useful tool for determining which variables are related to each cluster and how the variables are associated with the cluster (Conti, 1996, p. 70). Means for each of the 15 learning strategies in SKILLS were calculated for each of the four clusters. A one-way analysis of variance was conducted on each of these 15 variables to determine if there were significant differences among the four cluster groups (Bighorn, 1997; Hays, 1995; Kolody, 1997; Korinek, 1997; Lockwood, 1997; Strakal, 1995; Yabui, 1993). Significant differences existed in 9 of the 15 learning strategies. These were Planning, Reward/Enjoyment, Confidence, Organization, Using External Aids, Generating Alternatives, Identification of Resources, Critical Use of Resources, and Use of Human Resources (see Table 7) These nine significant variables were retained to characterize and assist in naming the groups.

Table 7. ANOVA of Learning Strategies by Cluster.

Strategy	<u>df</u>	<u>SS</u>	<u>MS</u>	<u>F</u>	<u>p</u>
Planning					
Between	3	95.56	31.85	15.27	.0001
Within	87	181.42	2.08		
Reward					
Between	3	79.62	26.54	10.88	.0001
Within	87	212.19	2.43		
Confidence					
Between	3	20.35	68.79	35.9	.0001
Within	87	166.63	1.92		
Use of External Aids					
Between	3	75.22	25.07	9.19	.0001
Within	87	237.19	2.73		
Critical Use of Resources					
Between	3	110.36	36.78	19.31	.0001
Within	87	165.76	1.90		
Use of Human Resources					
Between	3	155.32	51.77	19.297	.0001
Within	87	233.42	2.68		
Identification of Resources					
Between	3	64.57	21.53	10.7589	.0001
Within	87	174.05	2.005		
Generating Alternatives					
Between	3	37.27	12.42	4.8366	.0037
Within	87	223.45	2.57		
Organization					
Between	3	27.16	9.05	2.84	.0425
Within	87	277.30	3.19		
Monitoring					
Between	3	6.96	2.32	1.04	.3764
Within	87	192.99	2.21		
Testing Assumptions					
Between	3	7.34	2.45	1.02	.3879
Within	87	208.62	2.39		
Memory Application					
Between	3	7.09	2.36	.9807	.4057
Within	87	209.89	2.41		
Attention					
Between	3	6.91	2.30	.75	.5265
Within	87	267.99	3.08		
Conditional Acceptance					
Between	3	4.89	1.63	.6992	.5550
Within	87	203.06	2.33		
Adjusting					
Between	3	3.1	1.03	.6488	.5858
Within	87	138.72	1.59		

Tukey post hoc tests were used to locate the differences in the cluster groupings for those learning strategies which showed a significant difference. This process is necessary because "the significant F ratio by itself does not tell the researcher which of the group means are significantly different from the others" (Huck, Cormier, & Bounds, 1974, p. 67). The means for each cluster which were used in these tests are displayed in table 8.

Table 8. Means of Cluster Groupings on Significant Learning Strategies.

Variable	Problem Solvers	Architects	Believers	Resourcers
Planning	7.7	10.4	9.9	8.7
Reward	7.6	6.9	7.8	5.5
Confidence	8.0	6.6	10.0	6.0
Organization	8.2	9.1	8.0	7.4
External Aids	7.3	8.9	7.5	9.7
Generate Alternatives	10.4	8.7	9.2	9.3
Identification of Res	7.3	9.1	8.4	9.4
Critical Use of Res.	7.9	6.8	8.4	10.0
Human Resources	9.3	7.3	6.6	9.1

Naming the Clusters

The multivariate technique of cluster analysis produced a solution with four clear and distinct clusters of learners. Thus, this analysis, which sought to investigate the research question related to clusters of learners existing in the data, demonstrated that it was possible to identify distinct clusters of learners among

advertising salespeople in major Montana media markets based on learning strategy scores on SKILLS.

Through quantitative means and analysis of other SKILLS studies in which clusters were determined, four distinct groups of learners were identified and described thus affirming that it is possible to identify clusters of employees based on their scores on SKILLS. The combination of these techniques allowed the research questions which asked about the description of these groups to be answered. The descriptions of the four groups of learners are the results of the cluster analysis, the analysis of variance conducted with each variable when the participants were grouped by clusters, an analysis of previous studies using SKILLS and comments in the Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS) manual (Fellenz & Conti, 1993). Following is a description of the characteristics of each of the four clusters identified in this study which are the Resourcers, the Problem Solvers, the Architects, and the Believers. Each of the groups was also compared to the studies completed by Kolody (1997) and Gehring (1997). Comparisons were made to these two studies because the Kolody study had the most comprehensive sample and because the Gehring sample was similar to the sample for this study.

Problem Solvers

Problem Solvers use the widest variety of strategies of any of the four groups. For instance, the Problem Solvers' primary learning strategy is the Critical Thinking strategy of Generating Alternatives. This is followed by the Resource Management strategy of Using Human Resources. Although not as strong as the first two, Problem Solvers also use the Memory strategy of Organization and the Metamotivation strategy of Confidence. The Problem Solvers were found to closely resemble Kolody's (1997) Critical Thinkers and Gehring's (1997) Reflective Planners.

Problem Solvers have learning strategies which indicate that they are individualistic and creative. Kolody (1997) found members of her similar group did not like to memorize information. Instead, they preferred to experiment and use practical experience to learn new knowledge.

Salespeople in the Problem Solvers group would probably work with customers on a professional basis. Their approach might include a very business-like analysis of customer needs and a close look at different alternatives. Since Testing Assumptions was a strategy most salespeople used, advertising salespeople who fit the Problem Solvers profile

would most likely test several alternative advertising plans to see which one would deliver the best target market numbers.

Although Problem Solvers probably prefer to work on an individual basis, their reliance on Planning and use of Human Resource strategies makes them good team leaders or sales managers. The Problem Solvers group was the largest cluster.

Architects

Architects are focused learners who design a blueprint for learning and follow it. Their learning strategies suggest conscientious, results-oriented high achievers who rely heavily on the learning strategies of Planning, Memory Organization, Using External Aids, Generating Alternatives, and Identification of Resources. Architects closely resemble Kolody's (1997) Navigators and Gehring's (1997) Focusers.

Planning involves knowing "how to elicit purpose from both themselves and the situations and how to organize and identify the steps essential to the learning process" (Yussen, 1985, p. 280). Because of the great importance of Planning to Architects, schedules are important to them, and

this type of learner becomes stressed if their schedules or plans are disrupted. Architects like to be presented with the "big picture" first, so they know what is expected. Then they plan their learning schedule according to deadlines and the final expected result. Group work is often difficult for learners like the Architects because if they are teamed with members less focused than themselves, like Navigators they may have "a tendency to take over and dominate the group" to ensure that the schedule and plans are adhered to (Kolody, 1997, p. 99). Navigators feel that:

Group work is fine if you have a leader that keeps things on track. Again, I hate wasting time. I like things done yesterday, and if they can't be, I'll do them myself (p. 99).

Memory Organization is also important to Architects. Memory Organization is described as structuring information so that the material can be better stored and retrieved from memory (Fellenz & Conti, 1989). Through this process, Architects restructure information from the form in which it was originally presented (Seamon, 1980). Architects summarize information and group it into subsets; this is otherwise known as chunking (Paul & Fellenz, 1993, p. 23). Another common memory technique used by Navigators that Architects might also use is to link pieces of information

together. This is done in to compare new information to something we are already familiar with (Kolody, 1997, p 99).

As Norman (1982) suggests:

The best organizational strategies involve putting the material to be learned into frameworks that naturally guide the retrieval process. This calls for understanding the material to be acquired so well that it fits naturally into an existing framework of knowledge. Thus, the new material is understood, fits into previous knowledge, and is made retrievable "with little effort" (Paul & Fellenz, 1993, p. 21).

One aspect of effective Planning, which is heavily used by advertising salespeople in the Architect category is good time management. Since successful salespeople need to manage their time effectively in order to succeed, Architects should do well.

Architects rely heavily on Identification of Resources which deals with having both an awareness of appropriate resources and a willingness to use these resources (Fellenz, 1993, p. 36). Salespeople with these characteristics usually make the best presentations since they are good at Planning, Using External Aids, and Identification of Resources. These resources could be the customer, doing research on the internet, using company sales materials or people working for the customer's company.

For Architects, the necessity of having resources available is so important that not having the right resource

might be a barrier to learning. To overcome this, advertising salespeople who use learning strategies associated with Architects will want to have resources like ratings results, customer profiles, industry reports, the availability of computer programs to search databases, or industry association data.

Believers

Believers have tremendous confidence in their ability to learn new information. Their high score of Confidence is complimented by a nearly equal high score on Planning. The two strategies together set this group off by itself.

Since they are very similar to the Engagers in Kolody's (1997) study, the Believers should be good at establishing relationships. This skill could help the Believer advertising salesperson develop relationships with the key people in the sales relationship. Since they also rely on their Planning and Generating Alternatives learning strategies, the Believers have the learning skills that can help them find the right advertising program for their clients.

The weakness in the Engagers is they are not detail oriented (Kolody, 1997, p.114). If the Believers are

similar then although they may come up with great customer strategies, managers should make sure someone else checks over their work. Likewise, one should not expect Believer's call sheets to be in on time. Instead, they will probably be too busy planning for the next sales call and generating alternative approaches for it.

Like Engagers that rely on the affective domain as the dominant factor in their learning (Kolody, 1997, p. 116), Believers are good people to have on teams or work in groups of people. Their learning strategies support interaction and collaboration, both with their own team and with the customer's team. Consequently, these would be good salespeople to have calling on advertising agency business or very large accounts. In these situations they would have the skills to pull together a variety of decision makers and influencers in order to make a sales negotiation work.

Resourcers

Resourcers initiate learning through the use of all the resource oriented learning strategies. These are the Critical Use of Resources, Identification of Resources, and the Use of Human Resources. Resourcers are also high in the

use of the Critical Thinking strategy Generating Alternatives and the Memory strategy of External Aids.

Whereas the Believers initiate their learning once they get internally motivated, the Resourcers are externally oriented since they need to identify many types of resources in order to learn. The high scores in the Resource Management strategy area would probably suggest these salespeople are "more competent learners" (Fellenz & Conti, 1993, p37). Furthermore, the high score in the Critical Use of Resources could indicate that the reason Resourcers prefer to use the Generating Alternatives strategies is the availability of a preponderance of information from resources.

Like the Architects, Resourcers make use of lists and notes. These learners find writing it down helps in their understanding and provides them with something they can use to assist in improving their understanding.

Resourcers make significant use of locating resources, particularly human resources. Use of Human Resourcers refers to use of dialogue with people to seek different opinions or insights, to thinking through a problem, and to gather support (Fellenz, 1993, p. 37). However, the type of resource they used depends on the type of learning activity. When studying a concept, some Resourcers will go to a

person, but when looking for facts they will, go to another resource such as a manual.

Salespeople in the Resourcers group will do a lot of research with advertising resources like media kits, rating services (e.g. Nielsen) and SRDS manuals in order to find the best resource. Once they have the information, they can be expected to organize it around alternatives, which are generated either through other people like a sales manager or by members of the customer team.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

Summary

Historically, salespeople have not had to rely on learning new knowledge once they completed their initial sales training. However, as business transitions from a product-oriented and sales-oriented marketplace to one driven by customer needs, salespeople find themselves at the center of the organization's effort to meet those needs. Technology, the global marketplace, emphasis on total quality management, and re-engineering have positioned the salesperson as one of the key people in finding out what customers want and then in relaying the organization's response to the customer. In short, the salesperson is now a knowledge worker.

If salespeople are to successfully fulfill their new role, they will need to increase their ability to learn. They must constantly learn to keep up with the status of customers, customer's customers, competitors, and their

company. A future critical success factor for organizations will be the ability to implement continuous learning programs in which salespeople will want to participate. Furthermore, salespeople will also have to take responsibility to manage their learning experiences to make sure they learn the right information in the best way. To accomplish this goal, salespeople and their companies must find the best way to learn new knowledge. They will need to determine the most efficient and successful learning strategies for maintaining or establishing competitive advantage. Organizations will also need to know if different variables such as age, gender, and educational background make a difference in the way their salespeople learn.

Therefore, the purpose of this study was to identify the learning strategies salespeople employ to solve real-life problems. To accomplish this, the relationship of these learning strategies to age, gender, education, and experience was investigated. The study also explored whether there are distinct groups of learners among people in the sales profession.

This descriptive case study investigated the relationship between learning strategies used by advertising salespeople working for major market Montana newspapers,

television stations, and radio stations. It utilized the Self-Knowledge Inventory of Lifelong Learning Strategies (SKILLS). The two multivariate statistical techniques of discriminant analysis and cluster analysis were used. Findings from the cluster analysis were compared to previously identified groups of learners in research projects using SKILLS.

The sample of 91 salespeople ranged in age from 23 to 60 with a mean of 38. Females represented 57% of the sample. Over 86% of the sample had attended a post-secondary institution, slightly above 48% had completed a degree, and the average years in media sales was 8.7 years. Newspaper advertising salespeople comprised 14.3% of the sample with radio advertising salespeople making up 31.9% of the sample, and television advertising salespeople consisting of 52.7%. Just over 13% of the sample considered themselves as having extensive sales training. Almost 41% of the sample rated themselves at the level of considerable sales training while another 35.2% indicated a moderate level of training. Only 9.9% of the salespeople stated they had limited training. Almost 20% of the sample were sales managers.

Employee responses on the SKILLS instrument were used to determine the learning profiles of the employees. The SKILLS instrument produced scores in the learning strategy areas of

Metacognition, Metamotivation, Memory, Critical Thinking, and Resource Management and scores in each of the 15 individual learning strategies. Possible learning strategy area scores range from 12 to 36. Resource Management with a mean of 25.2 and Critical Thinking with a mean of 25 were the most preferred learning strategy areas. The least relied upon learning strategy area was Metacognition with a mean of 22.6. The scores for the 15 individual learning strategies, which had a range of 4 to 12, revealed high use of several strategies. The three most preferred strategies with their mean scores were Generating Alternatives (9.52), Planning (8.99), and Attention (8.97). The three least used learning strategies with their mean scores were Memory Application (6.98), Reward (6.96), and Monitoring (6.41).

Discriminant analysis was used to determine if learning strategies could be used to determine how groups differed when grouped according to gender, age, education, and years in media sales. No discriminant function was powerful enough to be useful in discriminating between the groups based on learning strategy use. Therefore, it was determined that it was not possible to discriminate between those in various demographic groups using learning strategies as identified by the SKILLS instrument.

Cluster analysis was performed to determine if it was possible to identify distinct clusters of employees based on their learning strategy preferences as indicated by SKILLS. This process identified four clusters of learners. Analysis of variance revealed that nine of the learning strategies were significant in defining the clusters. Each significant cluster had distinct characteristics based on the learning strategies used by the group.

Based on the quantitative data collected, comparison to other SKILLS-related studies, and a review of the SKILLS literature, the four clusters of learners were named the Resourcers, the Problem Solvers, the Architects, and the Believers.

The Resourcers rely heavily on all of the Resource Management strategies. These include Critical Use of Resources, Identification of Resources, and the Use of Human Resources. The Resourcers also used the memory strategy Using External Aids, such as using written lists or depending on people to remind them of critical issues. The Problem Solvers are the most varied in their use of learning strategies. They primarily use the Critical Thinking strategy of Generating Alternatives. However, the use of Human Resources followed by the Memory strategy of

Organization and the Metamotivation strategy of Confidence typify the Problem Solver.

Salespeople in the Architects category are heavily oriented to the Metacognition strategy of Planning. However, they complement Planning with the memory strategy of Organization and the Resource Management strategy of Identification of Resources.

Although they are similar to Architects in using Planning, the Believer's dominant strategy is the Metamotivation strategy of Confidence. The Believers have the potential for great plans because of this high-confidence level. Complementing their Confidence and use of Planning is the Critical Thinking strategy of Generating Alternatives.

Conclusions

Current salespeople use several key learning strategies that promote success in the advertising business.

General managers of media companies face many of the changes most other companies face in these turbulent times. To survive during difficult times, organizations want their salespeople to develop the ability to effectively analyze a customer's market situation and find their customer's needs.

This is an essential element of the marketing concept. Furthermore, once the analysis is complete, managers generally look to their salespeople to prepare and deliver a proposal that will enable their company's product or service to meet the customer's needs. Salespeople need to continuously learn to acquire and maintain skills if they are to remain competitive. Consequently, management expects a salesperson to have the ability to learn the skills needed to go out and learn about the customer.

This study has shown that Montana advertising salespeople use several learning strategies that enhance their ability to learn about their customer's needs. If management makes themselves aware of these strategies and how salespeople use them, they will be able to make their sales forces more productive.

For example, the top four strategies used by the advertising salespeople are Generating Alternatives, a critical thinking strategy; Planning, a metacognition strategy; Attention, a metamotivation strategy, and Identification of Resources, a resource management strategy. All four of these learning strategies are essential to the successful analysis of customer needs and finding a solution for those needs. By using these learning strategies, a salesperson would first consider how to learn about a

customer's needs through careful planning. Through the planning process, the salesperson would generate several alternatives. In selecting appropriate alternatives, the salesperson most likely would determine the best source of information to use.

The use of learning strategies extends beyond just learning about the customer, but also to helping the customer learn about which alternative proposed by a salesperson will work best for them. This is an important skill for a salesperson to have since every customer situation varies. For example, situations can vary based on demographic factors, psychographic factors, or geographic factors.

However, the least used learning strategies are also important to the level of success a salesperson achieves. The learning strategies advertising salespeople were lowest in were the Metacognition strategies. Even though planning was one of the highest, the complementary Metacognition strategies of Adjusting and Monitoring were low. Monitoring was the least used of all the learning strategies.

This finding is significant because a great plan for learning may not work out the way a salesperson expected it to. However, unless salespeople are monitoring their learning, they will not know the plan is not meeting it

objective. Furthermore, if the salesperson does not adjust for the variance from the original plan, failure is almost certain.

Another learning strategy advertising salespeople seldom used was Memory Application. One advantage of using this strategy is remembering what may not have worked in the past. Use of this strategy may come from information from a resource or personal experience. Either way, failure to find out or remember what has not worked previously could also lead to a failed learning experience with the consequence of a lost customer.

The other learning strategy advertising salespeople used infrequently was Reward/Enjoyment. Although this strategy is often associated with the fun of learning a new skill or activity and may not necessarily apply to a business training situation, its low ranking could suggest a problem with sales training.

Since the circumstances in which salespeople find themselves require constant learning, management should look at ways to make the training enjoyable. If salespeople do not look forward to training, they may find excuses to avoid it. The effect may be the failure to obtain proper training and eventual lost sales. One reason salespeople may not look forward to training is the neglect by management of how

different groups of people use different strategies to learn. By analyzing what group a salesperson fits into and then what learning strategies that particular group uses, management could enhance its sales training results.

Groups of Learners

Learning strategies are not a useful tool for discriminating among various demographic groupings.

Four distinct groups of learners exist in the area of adult learning among advertising salespeople.

The major conclusion of this study is that four distinct groups of learners exist in the adult learning population for Montana advertising salespeople. Each of these groups have explicit preferences for learning strategies and each group utilizes a prominent pattern of learning strategies specific to that group. Resources make the effort to critically use resources in their approach to learning something new. Problem Solvers generate alternatives. Architects plan. The Believers approach learning situations with confidence, believing they will successfully complete their learning task.

One important conclusion from this study is that demographic variables do not affect placing learners into

groups. Neither age, gender, education, or years in media sales affected the learner's choice of strategy. This inability to associate any demographic characteristics with learning strategies indicates that the variance due to demographics is evenly distributed across the various learning strategies.

Although this study examined the learning strategies of Montana advertising salespeople, these findings have been confirmed through additional studies that examined various diverse populations. Recent studies using SKILLS to measure learning strategies include populations in the corporate, medical, military, business, two-year college, and tribal settings. Learning strategies were examined for American Express financial planners (Conti, Kolody, & Schneider, 1997), for nursing students within the state of Montana (Lockwood, 1997), for United States Air Force personnel (Korinek, 1997), and for Native American tribal college students and community members (Bighorn, 1997), for people in the workplace (Gehring, 1997) for students at a technical college, (Strakal, 1995), and for high school students in college credit technical training (Ungricht, 1997). The findings and conclusions from each of these studies resemble the major finding and conclusion of this study in that distinct groups of learners exist in settings based on the

learning strategies utilized by the adult learner. Each study found distinct groups of learners; they also were unable to uncover any relationship between learning strategies and general demographic variables. Furthermore, these studies used samples of many different sizes, that ranged from over a thousand to less than one hundred. The groups from most all of the studies could be considered subsets of the Kolody study, which used a sample of 1,143. For example, Lockwood (1997) found four distinct groups of learners in a study that examined learning strategies of nursing students in the state of Montana. Using a similar design which involved focus group interviews, Lockwood named her groups Intuitives, Reinforcers, Independents, and Retainers. Based on the results of this cluster analysis, Lockwood concluded that her groups were compatible with the five distinct learner groups found in Kolody (p. 210). Similarly, Gehring (1997, p. 141) found four groups which he concluded were subgroups of those found by Kolody.

Although the finding of specific groups of learners opens up many opportunities for analysis of how best to help people improve their ability to learn, there is the potential for misuse. For instance, it is feasible to see how some might want to stereotype learners based on what cluster they show up in. Studies have shown where the

popular Myers-Briggs indicator was used to make hiring decisions by stereotyping applicants (Heineman, 1996).

Kolody (1997) addressed the issue as follows:

This typology of five types of learners can be useful for initially identifying groups of learners encountered in the instructional setting. While these characteristics apply to the general adult learner and provide a conceptual basis for understanding the adult learner, the individuality of each learner must also be considered. Such labels can be beneficial to the selection of appropriate methods and techniques when they are used to focus understanding, discussion, and reflective thought about the learner; however, they can be detrimental if they are used to avoid critical thinking about the learner (p. 145).

The advertising industry is an industry going through considerable turmoil. Deregulation in 1997 has led to extensive mergers. The result is greater pressure on the salespeople and sales managers to improve performance. Meeting these increased goals will require more critical analysis and training of the sales force.

Although different populations of advertising salespeople (i.e., New York Billboard salespersons) might have different groupings because of having a very specific population, it is logical to conclude based on the extensive variety of SKILLS studies completed that there will be four or five groups of learners with specific learning strategies that characterize a larger target group. It is also logical to conclude that managers can rely on the characteristics of

their groups to point the way to the learning preferences rather than relying on demographic variables. Consequently, managers could have the confidence to develop their sales force training around learning skills rather than letting demographics influence their decisions.

Recommendations

Kolody (1997), Lockwood(1997), and Gehring (1997) all found that each distinct group of learners had a preference for specific instructional methods. Furthermore, most of those in the groups feel that they learned best when involved in a learning situation that suited their preferred learning strategy (Kolody, 1997). Kolody went on to describe various approaches to teaching college students based on their learning strategy grouping. Her recommendations were based on focus group and individual interviews with the students.

Since advertising salespeople do form distinct groups of learners in the selection of learning strategies as found in the other studies (Kolody, 1997; Lockwood,1997; Gehring, 1997), the implication is that sales training would also improve if training was based on the learning strategies of

the salespeople. Consequently, trainers of salespeople should develop sales training based on learning strategies.

To accomplish this objective, further research into the use of learning strategy based training is needed. One aspect that additional research could shed more light on is a longitudinal study of the effect on the selection of learning strategies over time.

Another question additional research could answer is would an awareness of learning strategies or the addition of training in the use of specific learning strategies change which strategies a salesperson used in similar circumstances. In order to answer these questions, some thought and research into train-the-trainer programs would have to be done. Other questions would need answers. For instance, would an Architect trainer have an adequate knowledge of the learning strategy skills needed to teach a Problem Solver?

Other sales learning issues also affect how effective a learning strategy based training system would work. A study which compared learning orientation to a performance orientation showed how a learning orientation was related to working smart as compared to working hard (Sujan, Weitz, Kumar, 1994). It was found that a learning goal orientation motivated salespeople to work both smart and hard, whereas a

performance goal orientation motivated a person toward only working hard (p. 39). If a comparison of learning strategies used by salespeople working smart versus those working hard were made, the results could possibly help sales organizations improve their long-term sales success.

The ability to adapt both training and experience to changing conditions is considered one way for businesses to gain a competitive advantage (Slater & Narver, 1995). Furthermore, adaptability is considered the key characteristic in developing "executive level skills" (Smith, Ford, & Kosloski 1997). "Executive level skills" is the term given to the ability to adapt knowledge and skills successfully to any situation (p. 90).

If salespeople are to gain mastery of executive level skills and subsequently develop competitive advantages, an orientation to the use of learning strategies in training could prove useful. The theme of Smith, Ford, and Kosloski (1997) is that metacognition skills are imperative to gain a mastery in adaptive expertise. They specifically emphasize the combination of planning, monitoring, and adjusting as the foundation of learning how to adapt.

Since the findings of this study indicated Montana advertising salespeople select Planning as a key learning strategy but almost totally neglect the other metacognitive

skills of Monitoring and Adjusting, significant improvement in their learning and applying new knowledge and skills could be achieved through training in these learning strategies. This is even more important in light of the major changes occurring in the media industry, especially radio. As advertising salespeople face the change of deregulation, success could well hinge on how well they adapt to changes in customers, managers, co-workers, and business location.

As business moves to an information-based economy oriented around the technology and the global marketplace, salespeople are taking a more self-directed approach to their training. To meet this need for more self-directed learning, salesperson training may need to place a greater emphasis on the understanding of learning strategies and how different people use different strategies to learn.

Besides the benefit of emphasizing metacognition strategies previously mentioned, additional research and experimentation with the other learning strategies could improve sales situations requiring greater self-directed learning in the training situation. Two strategy areas affecting the success of self-directed learning are the Metamotivation and the Resource Management strategies.

Montana advertising salespeople demonstrate a strong tendency to rely on Resource Management strategies in their learning, but only certain individuals make use of the Metamotivation strategies. Successful self-directed learning requires the adoption of Metamotivation strategies. Therefore, more work with how to learn these strategies should be done in the sales training area.

Current research has demonstrated that one way to influence the manner in which students process new information and acquire new skills is to instruct them in their use of learning strategies (Weinstein et al., 1988). One way to do this is to involve salespeople from different groups in learning exercises to expose them to the illustrated use of the strategies. Trainers, facilitators, and learners would need to learn about learning strategies to successfully accomplish this objective and meet the objectives of adaptive learning.

Furthermore, salespeople would probably be more successful in their learning if they were proficient in the use of all learning strategies and in an awareness of which situations to use each one. Thus, by expanding their "tool kit" of learning strategies (Fellenz & Conti, 1993), they could probably improve job satisfaction. Such activities could encourage learners to either practice the lifelong

learning strategies they already possess or to develop new ones in areas of need (Smith, 1982).

To effectively use learning strategies in the SKILLS format, sales organizations should start developing a base of knowledge about the learning strategies that their sales force use. To improve this base of knowledge, the sales organization should continue to monitor cluster groupings and the characteristics of these groups.

Several studies using SKILLS have incorporated focus groups and interviews with members of the various clusters which were recorded in order to better understand and describe the learning patterns of those in the group. This has proven to be a useful practice. Sales organizations that use SKILLS could enhance the data they receive through the use of focus groups and individual interviews. By refining this information, managers, and the salespeople can gain a better understanding of how they learn.

By incorporating this knowledge into both their sales training, which is both formal and informal, organizations can improve their probability of better serving the needs of the customer. If they are able to improve customer satisfaction, then the business can increase and profit objectives reached.

In the turmoil of merger, re-engineering, total quality management, and technology, sales organizations that gain control over their need for learning can gain competitive advantage over the competition. The end result is the greater potential for a successful company in all the stakeholders' view.

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APPENDIX

LETTER TO THE HOME OFFICE

Some of your fellow sales associates are concerned about a new Customer Satisfaction Survey your company plans to use. This survey will affect your measurement for compensation. Two of your co-workers want you to help them put together a letter to the General Manager that will state your views concerning this survey. You agree to help plan the letter, but you realize that you first must know more about the structure of the survey and what affects the attitudes of customers toward it. **How likely are you to use the following learning strategies in learning about the issues related to the Customer Satisfaction Survey in order to prepare an effective letter to the home office manager?**

Strategies for LETTER TO THE HOME OFFICE

- | | |
|---|--|
| 1. Deciding what methods work best for you in analyzing issues. | manager will bring about positive change related to the survey. |
| 2. Focusing on learning about the issues rather than worrying if you can write an effective letter. | 9. Forming a mental outline of the points you hear in discussions with co-workers that you want to remember until you get a chance to write them down. |
| 3. Reading previous letters and memos to home office personnel about issues affecting advisors in order to clarify your position. | 10. Testing your ideas out on people whose opinions might differ from yours. |
| 4. Checking the arguments of those opposing your position to pick out inconsistencies in your ideas. | 11. Keeping a list of the points you want to get more information about before you write the letter. |
| 5. Reminding yourself of how nice it would be to have a really effective and fair Customer Satisfaction Survey. | 12. Thinking about numerous possible solutions that could be used to address issues related to the survey. |
| 6. Checking with someone outside of the company who knows a lot about surveys. | 13. Recalling things about other people's letters that you found convincing. |
| 7. Reflecting back to see if you are sticking with your plan of learning. | 14. Getting some feedback on your ideas before you send the letter to the home office manager. |
| 8. Confirming your belief that a statement of your position in a letter to the home office | 15. Thinking about what will happen if the ideas in your letter are adopted by the home office. |

REGULATIONS FOR SALES PEOPLE

Some sales people in your industry group have started to talk about new regulations concerning continuing education requirements that will affect all sales people within your company. In order to maintain your position with your company, you must comply with the new regulations. You hear that copies of the regulations are available from the national association, your state association headquarters, and from your local association president. **How likely are you to use the following learning strategies in learning about the regulations?**

Strategies for REGULATIONS FOR SALES PEOPLE

1. Thinking through what is important to know about these new regulations in order to decide what needs to be learned.
2. Setting aside a specific time when you are going to study the regulations.
3. Finding out if there is an 800 number where you can get answers to specific questions you have about the regulations.
4. Thinking through how the new regulations will actually change the way you do your job.
5. Reminding yourself of the difficulties you may avoid by learning the new regulations.
6. Deciding to look through the regulations themselves.
7. Comparing your understanding of the new regulations with commonly accepted practices on the job.
8. Reminding yourself that you have always been able to keep up with new regulations for a job.
9. Remembering the new regulations by organizing them according to the daily routine you follow at work.
10. Checking with your supervisor and fellow workers to find out if they have similar ideas about the new regulations.
11. Placing your list of key points about the regulations in a convenient place so they will remind you of what you have to do.
12. Thinking of various ways that you can use the new regulations to improve your job situation.
13. Thinking about past experiences you have had related to learning new job requirements so that you can avoid difficulties related to learning these new regulations.
14. Asking yourself if there are any parts of the job regulations that still confuse you.
15. Beginning to test some of the new regulations on the job to see if they are going to work for you.

RECRUITING SALES PEOPLE

Other sales people in your company have asked you to help recruit sales people for your company. You have volunteered to help study how to identify them and how to get them recommended to the company. **How likely are you to use the following strategies in learning how to recruit these sales people?**

Strategies for RECRUITING SALES PEOPLE

1. Asking yourself what specifically needs to be done before identifying the most appropriate sales people.
2. Organizing your time so you can learn alternative ways of recruiting sales people.
3. Beginning to form a list of resources on how to recruit others into your company.
4. Reviewing your recommendations to see if friendship for certain people has influenced the suggestions you have made.
5. Thinking about how your efforts will help your company.
6. Examining closely the qualifications of those suggested as new sales people by interviewing several people who have worked with them.
7. Reflecting back to see if you are sticking with your learning plan.
8. Feeling confident you will be able to identify the important characteristics needed for new sales people to your company.
9. Organizing ideas about recruiting around tasks that have to be done to recruit new sales people.
10. Talking with other sales people to test out your opinions on the qualities needed for a new sales person.
11. Using a notebook or note cards to keep track of ideas that you want to remember.
12. Thinking of various possible ways of recruiting good sales people.
13. Recalling similar experiences you have had in identifying good people so you can remember what worked best.
14. Asking yourself if there are any traits of good sales people about which you are still unsure.
15. Thinking through what could be done if those who are selected turn out to be poor sales people.

NEW RELATIONSHIP SALES CONCEPT

Your Region Director of Sales has been talking about a new concept in relationship selling that may help you improve your closing ratio. This has the potential to improve your service to customers and thereby increase your income. You would like to learn more about this concept so that you can begin to use it in your discussions and presentations to prospects and customers. **How likely are you to use the following strategies in learning about this new relationship sales concept?**

Strategies for NEW RELATIONSHIP SALES CONCEPT

1. Identifying what you need to know in order to learn about this new relationship selling concept.
2. Making up your mind to study the relationship selling information because you want to improve the quality of advise to prospects and customers.
3. Gathering some resources that will help you learn about this relationship selling concept.
4. Thinking about the advantages and disadvantages of using this new concept with your customers and prospects.
5. Reminding yourself periodically that learning this concept will allow you to better serve customers.
6. Setting up an appointment with your Region Director of Sales to help you make sense of all the information you have been receiving and hearing about.
7. Checking to see if what you are learning is actually helping you better understand the new relationship selling concept.
8. Feeling confident that you can learn this concept.
9. Forming a mental image of how this concept applies to your customers.
10. Testing your ideas about this concept with other co-workers who have already implemented this concept.
11. Starting a list of all the important questions you have about the new concept so you will remember to deal with them.
12. Thinking about numerous possible ways that you can apply what you are learning about this relationship selling concept to various types of customers and prospects.
13. Reflecting on previous experiences you have had in learning new concepts to know what techniques and approaches work for you.
14. Revising your learning plans if you feel you are not gaining insights into how to use this new relationship selling concept with your customers.
15. Deciding to begin to use what you have learned about the new relationship selling concept with the understanding that you will periodically check its effectiveness.

Answer Sheet for Salesperson Study

Read each of the sales person scenes. Turn to the page that describes various learning strategies following the scene. For each scene, select the 5 leaning strategies that you would Definitely Use, 5 that you might Possibly Use, and 5 that you would Not Likely Use. Enter the number for each of these 5 items in the proper box below.

Letter to Home Office	Regulations for Sales People	Recruiting Sales People	New Relationship Sales Concept
Definitely Use	Definitely Use	Definitely Use	Definitely Use
Possibly Use	Possibly Use	Possibly Use	Possibly Use
Not Likely Use	Not Likely Use	Not Likely Use	Not Likely Use

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