LEARNING SOLUTIONS EXAMPLES

Traci Frees

TABLE OF CONTENTS

- Presales

- Value Creation

- Deployment

- Change Management

- Organizational Fit

PRESALES

An example of how I worked directly with presales teams to identify business challenges, design targeted learning strategies, and deliver measurable improvements.

I led a project for a dental equipment manufacturer that was struggling with low sales performance and inconsistent product knowledge among its sales team, which was tasked with selling to dental offices. I began by organizing a series of in-depth interviews with sales leadership and account managers, and I reviewed their existing training materials and performance metrics. The needs analysis revealed gaps in their **launch readiness, product demonstration skills, and key account management practices**.

We designed interactive e-learning modules featuring scenario-based simulations, case studies directly relevant to dental office environments, fact sheets, and established a structured revision schedule to ensure that product information was continuously updated.

- **LMS Analytics.** We tracked login frequency, module completion rates, and average session durations to measure engagement with the new training modules.
- **Sales Metrics.** We established baseline conversion rates and overall sales volumes. After implementation, we compared these figures to monitor improvements in the team's ability to convert product demonstrations into sales.
- **Feedback Surveys and Interviews.** Pre- and post-training surveys were administered to assess the sales team's confidence in their product knowledge and demonstration skills. Follow-up interviews with account managers provided qualitative insights into improvements in client interactions.

Within six months of rolling out the new solution, we observed a 25% increase in sales performance. This was reflected in higher conversion rates and increased sales volumes. Survey feedback confirmed the sales team felt better prepared and more confident when presenting to dental offices.

VALUE CREATION

An example of how I worked directly with teams to identify critical business challenges and design innovative, targeted learning strategies.

I partnered with a pharmaceutical client whose training process was hindered by **inefficient fact sheet production**. Their ID team was responsible for updating fact sheets that were sent to pharmacy employees.

The lead IDs were focusing on aesthetics of documents without a standard template or revision schedule resulting in delayed updates. ("*whim based design*")

To understand the full scope of the issue, I organized focus groups and conducted in-depth interviews with the ID team, MSL representatives and pharmacy staff, and I reviewed existing training content and performance data.

This assessment confirmed that the current approach was too static to keep pace with rapid market changes.

I then collaborated with the in-house team of IDs to develop a standardized template for the fact sheets and streamline process from review to approval and dissemination.

After implementing the standardized template and revision schedule, the results showed a 30% improvement in team engagement, evidenced by increased LMS logins and higher module completion rates.

The time required to disseminate critical product updates was *significantly reduced*, as reflected in faster email engagement and quicker access to the updated fact sheets.

This approach **revitalized the fact sheet production process** to ensure that pharmacy employees received timely, accurate product information, directly addressing the client's performance challenges.

Measures

- LMS module completion, to track whether IDs were completing the training
- The speed of *update dissemination* by monitoring the time from the release of a product update to when pharmacy employees accessed the updated fact sheets via email open rates. This was the method of communication they preferred to use.
- Pre- and post-implementation surveys to capture feedback on clarity, timeliness, and overall satisfaction with the new process

DEPLOYMENT

An example of how I coordinated cross-functional teams to manage the rollout of a training program that needed agile design to accommodate changing business needs.

01 I managed the development of a **training program** for a Life Sciences organization launching a new product. Our team had completed 90% of the training course, and it was ready to roll out to the sales staff. Just as we were finalizing the launch, market conditions shifted, prompting a **strategic change** that **required a major revision** of the training content.

02 I organized a series of **rapid revision workshops** with our team and the client's stakeholders. During these sessions, we identified the key modules that needed updating to reflect the new market data and revised sales strategies. This collaborative approach ensured that we focused our efforts on the most critical changes.

03 To meet the new deadline, we **compressed our build time by 40% by streamlining the revision process**. We **prioritized essential content** updates over less critical aesthetic enhancements, ensuring that the training material was both accurate and timely. Post-launch surveys showed that 90% of the sales staff agreed the training accurately reflected the new market conditions and enhanced their readiness to engage clients.

CHANGE MANAGEMENT

Example of how I drive change management by aligning strategic training initiatives with changing business needs, ensuring that competencies and outcomes are continuously improved.

Expand the Market Reach thru Sales Training

I spearheaded the launch of **Vendor Insights** for YellowHammer IT, LLC—a product designed for MDUs facing vendor selection challenges during contract renewals or leadership changes. Historically, decisions in these settings relied on personal connections rather than objective performance data.

Vendor Insights streamlines the process by providing quantitative metrics and qualitative data on vendor performance, enabling data-driven vendor selections. The product was introduced to medical offices, clinics, and organizations that work with multiple vendors.

Develop Strategic Sales Training

I led the development of a targeted training program for our sales team. The training goal was to equip them with the skills and knowledge to sell *Vendor Insights* to various markets and enhance communication competence to key decision makers. **Key Components:**

- **Interactive E-Learning Modules.** Designed to explain the product's features and benefits.
- **Relevant Case Studies.** Demonstrating how *shifting from* relationship-based vendor selections to performance-based decisions can improve outcomes.
- **Virtual Practice Sessions.** Sales teams simulated sales pitches and address potential client concerns effectively. *"How to Handle Objections"*
- **Measures.** Tracked module completion rates. Conducted pre & post surveys assessed the sales team's confidence and product knowledge before and after the training.

Deliver Impact and Drive Change

Within three months of the training launch, our sales conversion rates increased by 40%, and follow-up surveys indicated that over 85% of the team felt significantly more confident when pitching Vendor Insights.This initiative modernized the vendor selection process for medical offices, clinics, and other organizations by shifting from a traditional, relationship-based approach to one driven by objective performance data. By aligning our training with market needs, we were able to adjust our strategy and ensure the sales training tied to measurable sales outcomes.

ORGANIZATIONAL FIT

CURIOSITY DRIVEN

Over my 15+ years as an educator, consultant, and problem-solver, I've honed a relentless curiosity that drives me to connect learning initiatives with strategic business goals.

I developed tailored solutions that addressed immediate training gaps but also enhanced broader business objectives to improve launch readiness and boost technical, strategic, and sales performance.

This *forward-thinking mindset* ensures I always seek to add value thru innovation.

SHARED VALUES

My approach is evidenced in various values especially "Get stuff done" and "Treat it like you own it."

I take full responsibility for delivering innovative, results-driven solutions, whether leading cross-functional teams to collaborate and create something new *together* or pivoting strategies in real time and *leading with my unique*.

My commitment to continuous improvement consistently drives significant performance gains and *awes clients.*

FOCUS FIRE

In gaming, a raiding group calls "focus fire" to eliminate a target swiftly and efficiently. I apply the same principle in my work when developing and executing solutions with precision across various fields. My experience and skills allow me to "focus fire" in a variety of business sectors, driving enhanced learning solutions and superior business performance through targeted, collaborative, and creative problem-solving through learning and development.

THANK YOU