Learner-Controlled Instruction and an LCI Program to Train Motor Carrier Sales Representatives

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LEARNER-CONTROLLED INSTRUCTION
AND AN LCI PROGRAM TO TRAIN
MOTOR CARRIER SALES REPRESENTATIVES

by

David Richard MacDonald

A Project Report
Submitted to the
Faculty of the Graduate College
in partial fulfillment
of the
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David Richard MacDonald
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CHAPTER I

INTRODUCTION

When reduced to its essence, systematic training of workers is a matter of economics. As labor costs spiral upward, companies are intensifying their search for ways to develop and maintain high levels of employee productivity. Poorly trained workers will likely represent hidden costs to organizations through their inability to produce at profitable levels. Untrained workers may be unable to produce at all and thus, in addition to creating problems for the organization through lost production, they are likely to fuel turnover rates as well. In dealing with turnover, most companies must spend significant amounts of money to recruit, test, and interview applicants for vacated positions. According to Business Week (1979),

A less obvious but equally important reason for the closer attention large companies are giving to human resources is the skyrocketing cost of employee benefits, which has risen from just above 20% of an average employee's salary five years ago to 35% today. With so much invested in an employee, reducing turnover rates is crucial. At Tenneco's J. I. Case subsidiary, the human resources department is credited with helping the company reduce its monthly turnover to 1.1%, compared with an industry average of 1.5% a month, by developing clearer job performance criteria and better training programs... (p. 121)

(Emphasis added.)

Those individuals selected to fill vacancies will nearly always require some minimal orientation and training time during which their production is usually marginal. An approach to organizational staffing is needed which will insure that an employee's tenure will not be
cut short due to his lack of performance. Training becomes the issue.

Purpose

Many methods have been developed over the years to impart job-related knowledge and skills. To the more traditional methods of lectures, discussions, and textbooks, instructional designers have added films, slides, audio tapes, television productions, and tutorials, as well as new learning formats such as computer-assisted instruction (CAI), programmed instruction (PI), and learner-controlled instruction (LCI). As one might expect, not all of these techniques are well-suited for all performance improvement situations. For one example, John Randall (1978) states that,

The lecture is a very common method of instruction. In it the leader does all of the talking. Lecturing is a relatively inefficient way of instruction because it does not actively involve members of a group. It can be effective only if in some way the group "thinks through" the information as it is being presented. This can be accomplished by having the individuals take notes, or the instructor can secure attention and hold interest by using communication aids. (p. 8)

The lecture is not unique in its lack of learner involvement. Though perhaps more interesting than the lecture, audiovisual techniques also treat trainees as a passive audience. The emphasis is, again, more upon "teaching" than upon "learning."

Obviously, then, some of the training formats with which employers are familiar may be ineffective in achieving objectives of training. The employer who develops strategies of training to upgrade the

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performance of subordinates will have taken a giant step toward maximizing the return on the investment made in those workers. The purpose of this project was to provide a comprehensive examination and an example of one specific and particularly useful training method.

Scope

Detailed coverage of this project did not extend to all methods of instruction. Initially the broad focus was on self-instructional techniques. Later, because this author believed that learner-controlled instruction was a nearly ideal instructional technique for many training situations, learner-controlled instruction was examined in depth.

Five major items were included in the examination of learner-controlled instruction: (1) the results of a survey of the literature relevant to adult learning theory and learner-controlled instruction, (2) a detailed presentation of the development process indicated to produce learner-controlled instruction programs, (3) a presentation of the general way in which LCI programs are integrated into an overall system of training, (4) a presentation of the learning process built into each "required activity" of an LCI program, and (5) an actual LCI program which could be used by a large motor carrier to train its Sales Representatives.
CHAPTER II

TRAINING TECHNIQUES

Prior to any discussion of specific training methods, two words should be defined: training and learning. Workable definitions are supplied by Hinrichs (1975) for these concepts which are basic to all subsequent discussion:

Training may be defined as any organizationally initiated procedures which are intended to foster learning among organizational members. Needless to say, the desired learning is in a direction which is intended to contribute to overall organizational objectives. Learning may be thought of as a process by which an individual’s pattern of behavior is changed by experience — for our purposes, the catalytic experience of the training activity. So, training is a systematic intentional process of altering behavior of organizational members in a direction which contributes to organizational effectiveness (King, 1964, p. 125; McGehee & Thayer, 1961, p. 3; Warren, 1969, p. 3). (p. 832)

Very probably as a result of having read B. F. Skinner's material on behavioral psychology, many other modern authors will be in agreement with the definition of learning given by Hinrichs. Schmuck and Schmuck (1974) offer another definition of learning which is very similar to Hinrichs' as they say, "The process of learning, according to most behaviorists, is itself not directly observable. A measurable change in behavior can be taken as evidence of learning, however" (p. 49). Later on in their text, Schmuck and Schmuck (1974) expand upon their definition of learning in the behavioral context by stating that,
Evidence of learning consists of prescribed responses to stimuli presented in a program, on a standardized test, or by a teacher's question. In a good program, the objectives are behaviorally defined, the information is presented in a logical and sequential manner, and there are methods for evaluating behaviors to be used as evidence of reaching the program's objectives. Such systematic procedures and means of evaluation are far superior to many methods of teacher-directed instruction and subjective evaluation. (p. 49)

The above definitions are particularly suitable to this study because they are behaviorally-based. The reader can see that, although it seems to be a common practice to think of "training" and "learning" as automatically overlapping terms, a clear distinction can be made between the two. Within the context of these definitions, training is the intent of managers; learning is the actual outcome. Ideally, training should lead to learning.

Three General Groupings of Training Methods

As mentioned in Chapter I, instructional designers have developed a multitude of training techniques, each with its own blend of characteristics. There are, however, three general groupings into which all training methods can be placed. As explained by Hinrichs (1975), they are:

1. **Content** techniques of training, which are designed to impart substantive knowledge or information on a cognitive level.

2. **Process** techniques, mainly intended to change attitudes, develop awareness of self and others, and impact the trainee's interpersonal skills.

3. **Mixed** training techniques, which may have both an information transmitting function as well as an attitude change function. (p. 848)
Hinrichs (1975) continues,

The literature on training reports little comparative research on the various techniques which is useful in deciding which technique to use to achieve which specific objectives. Most of the evaluation is based on logical analysis or common sense. It is in this area, in addition to the area of task analysis, in which there is the greatest need for systematic research in an effort to build a true psychology of industrial training. (p. 848)

It is appropriate at this point to cite examples of specific training methods found in each of the three general groupings of training approaches. Included under process techniques can be found such methods as modeling, role playing, and sensitivity training. Included in the category of mixed techniques are the examples of case studies, conference discussions, critical incident analyses, on-the-job training (including job rotation, performance appraisals, coaching, job instruction training, orientation training, and assistantships), and simulation. Content-oriented techniques are represented by the lecture methods, audiovisual techniques (records, films, slides, filmstrips, television, cassette tapes, etc.), and self-instructional techniques, examples of which are programmed instruction, computer-assisted instruction, and learner-controlled instruction.

Self-Instructional Techniques

One of the main dimensions along which each of the previous techniques could be ordered is that of the degree of learner involvement. A significant body of evidence exists to support the general contention by training specialists that, to the extent that a training
technique features learner involvement or control over the process of learning, it will be effective in meeting learning objectives. To several authors, the issue of permitting learners to become more responsible for training decisions is crucial. To Boles and Davenport (1975),

    Futurism in education must focus on learners, those persons who help them learn, and the learning process. Planning for learners of the future must relate to who the learners will be, their characteristics, their involvement in decisions regarding their own learning, and their career recycling. (p. 359) (Emphasis added.)

According to Irvine (1972),

    The...system should progressively involve the learner in making decisions...so that ultimately the learner controls his own learning. (p. 363)

And, in the words of Laird (1976),

    In the United States, Malcom Knowles has led inquiries into androgogy, explaining why adults need to become involved in learning decisions if the learning is to be significant and lasting. He contends (1) that adults see themselves as owners of unique experiences which they wish to invest in learning, (2) that they desire an immediate application of the learning, and (3) that adults profit more from self-directed than from authoritarian learning designs. (p. 42-2)

Again, the amount of learner involvement and control varies significantly among those techniques listed earlier, but probably none features as much learner involvement as the three self-instructional technologies. Hinrichs (1975) said of two of these that,

    Among the newest...techniques which have received a great deal of attention are two which are beamed specifically at self-instruction: programmed instruction (PI) and computer-assisted instruction
(CAI). In focusing on these new approaches, however, we should not lose sight of the fact that the auto-instructional techniques are probably the oldest form of instructional procedures; probably more learning takes place simply by reading an appropriate book than by any other technology. (p. 850)

Advantages of PI and CAI are: 1) learners must furnish active responses to material presented during a learning program, 2) both techniques allow for differences in individual learning rates, and 3) the feedback to responses is prompt and non-threatening to the learner. Even with these advantages, PI and CAI are of limited use and effectiveness; neither technique gives the learner control over sequencing the material to be learned, choice of materials used, or assessment of the success of the process in achieving the learning objectives. Bergevin (1967) justified his comments about the importance to a learner of freedom in learning as he stated that,

It is desirable to present the participants in an adult learning program with as many opportunities to select content, choose leaders, determine time, place, and length of meetings, and decide on procedures as is consistent with the well-being of the program. Freedom is a critical problem in adult educational situations. The proper exercise of freedom can make a learner feel that he counts for something, that he is important enough to make a contribution and be listened to. When the learner feels he is respected and taken in as a co-partner in learning, he is more likely to improve his power of perception and to learn better. (p. 130)

Bergevin's "power of perception and to learn better" may well be a function of the learner's power, or control, over instructional decisions. Frank T. Wydra (1978) explained why most current training programs assume instructor-oriented characteristics:

Power, or control, is a topic often avoided in discussions of instructional design. The avoidance
is usually unintentional. Our assumptions about instruction traditionally place control and power in the hands of the instructor. For example, it is assumed that the instructor will establish the content of the instruction. The texts and course materials are reviewed, narrowed and edited by the instructor before the learner is allowed contact. The control of content permits the control of presentation device. Content is often pre-packaged in a single format. So, with the selection of an information resource the presentation mechanism is also selected. The power to make these selections is traditionally the prerogative of the instructor. It is also assumed that the instructor will establish the sequence of instruction. The power to control sequence often controls both route and pace. The learner who is "behind" is rarely permitted a digression from the sequence. The learner who is "ahead" is often driven to digression. But in either case, it is not traditionally assumed that it is the learner who has the power to control the sequence.

It is also regularly assumed that the instructor is responsible for evaluating the learning achievement. Through the evaluation, the instructor is to provide feedback to the learner as learning progresses. At some point in time or content the instructor, it is assumed, will issue a judgement that labels the student as learned or unlearned.

These assignments of power are often made unthinkingly. We assign them to the instructor because that is where they traditionally have been placed. There is, however, an alternative. (p. 4)

The alternative to which Wydra referred is, of course, learner-controlled instruction. Chapter III provides a broad look at LCI and adult learning theory, while LCI is discussed in step-by-step detail in Chapter IV.
CHAPTER III

THE LITERATURE SURVEY

This chapter provides a listing a general assessment of several books and articles relating to LCI and adult learning theory. The summaries presented here of other works can be valuable to the reader to the extent that he may begin to understand why the use of LCI programs, or others with similar characteristics, is becoming increasingly frequent.

It is not the purpose of this chapter to provide the reader with a detailed background in the psychology of adult learning; many authors have written upon this subject already. The purpose of this chapter is two-fold: (a) to provide evidence that learner-controlled instruction has been used with considerable success, and (b) to guide the reader to material appropriate for further investigation.

Survey Contents

There is an abundance of written material on learning theory. Each successive generation of authors seems to add its own dimension to the subject, although this is not to be wholly unexpected. Other areas of study (psychology, educational technology, communication) may create an impact on learning theory. Any changes in thinking or new developments in these areas are likely to alter subsequent researchers' approaches to learning theory. Fortunately, one can focus
his efforts within a literature survey of learning theory by delimiting the topic. In this project, the overriding concern was with adults as a group. By selecting this group as the focus for study, many books centering only on adolescent learners were omitted. The books and articles selected for review, forming a list which by no means was meant to be exhaustive, contained material which proved to be the most relevant and useful. The entries are as follows:


At the time of this study, Dr. Gilbert was the president and founder of the Praxis Corporation, a New Jersey-based organization which conducted ongoing research in the area of performance systems, offered consulting services to business, industry, and the military, and conducted periodic workshops to train participants to develop, implement, and evaluate performance systems. His book was revolutionary in the field of training, as it attacked many heretofore well-accepted beliefs of trainers and educators. Gilbert (1978) said, "Here is a small sample of the conclusions that I believe serious readers will come to accept as obvious good sense after they have finished the book:

1. The more incompetent people are, the easier it is to improve their performance.

2. Human competence is inversely related to knowledge, hard work, and motivation.

3. The most incompetent person in the world might be the most efficient.

4. Human competence cannot be found in human behavior." (p. vi)
Particularly surprising at first glance was the conclusion that human competence could not be found in human behavior. Behavioral scientists have long proclaimed the utility of behavior as the criterion against which "success" or "performance" should be measured. Dr. Gilbert unearthed a logical flaw in this approach in that he believed it was **accomplishment** (carefully defined), rather than behavior, which should be the criterion measure of performance. To cite an example of this which relates to the **Company X Sales Orientation and Training Program** (Appendix), the performance of graduates should be measured in terms of their various dollar and weight quotas met (accomplishment) instead of whether or not they could state the principles of time management, could develop a good routing schedule, and could dress in a professional manner (behavior). According to this thesis, behavior can lead to performance but does not inevitably do so.

Gilbert speaks to the issue of LCI (to him, LGI for "learner-guided instruction") in Part II of his book. In this section entitled "Policies, Strategies, and Tactics" he explains what LCI is and one way in which LCI programs can be integrated into a performance-engineering system. Gilbert has dubbed a system of this nature the "FAIR" program, an acronym for Functional Assessment and Instruction Resource program. According to Gilbert (1978),

> My performance-engineering selection system, the FAIR program, begins with a clear statement of what is to be accomplished: the selection of people most likely to be exemplary performers in a specific job. This objective is, of course, nothing new. But the requirements placed on it are important:

1. Anyone can enter a FAIR program.
2. All entrants must be given the opportunity to know the job intimately—its specific accomplishments, requirements, and standards.

3. All entrants must be given a description of what they need in order to master the job.

4. Entrants are given the opportunity to learn the job.

5. The primary evaluation is of actual job performance.

6. Behavior is evaluated only when entrants have shown that they can do the accomplishments required of a job.

7. Behavior is evaluated in only two ways:

   (a) Cost to the company in completing the required training.

   (b) The proven existence of very specific and job-related behavioral handicaps—such as the proven inability to make a public presentation when that is a critical job requirement.

To understand the FAIR system, you need to know something about "learner-guided instruction" (LGI). An LGI system...does these things:

1. It describes the accomplishments, requirements, performance measures, and standards of the job.

2. It describes a theory of the job, distinguishing exemplary from mediocre performance.

3. It directs the entrant to opportunities for observing how exemplary performers do the job.

4. For each job accomplishment, it provides
a description of what one needs to know
to master that accomplishment.

5. It describes a series of tasks one can
perform to learn the job.

6. It identifies many resources to help
one learn to perform the tasks.

7. It describes the criteria for learning
to master the tasks.

8. For each accomplishment, it provides
an opportunity to perform and then be
evaluated and signed off by a super­
visor or manager.

9. It gives the entrant a chance for a
self-test before being judged by others.

10. Final decisions about the entrant is
made [sic] by a "worthy performance"
 ratio, which gives points for job ac­
complishments and subtracts points
for the amount of additional training
an entrant requires after completing
the LGI. (pp. 326-28)

Anyone interested in the state of the art of performance im­
provement may want to include Human Competence in a list of reading
material.

and Gordon H. Bower (1975).

Theories of Learning--Fourth Edition does appear to differ sig­
nificantly from the third edition of 1966. The 1975 edition presents
a section (Section 15) on recent developments in the field of teach­
ing and learning. The authors' summary of the purpose of the text
is probably the most appropriate for the purposes of this study. In
their words (Hilgard and Bower, 1975),

The aim of this text is to provide...an
understanding of modern learning theory, its historical context and background. To this end we review the theories of learning expounded by the major "schools" of psychology--behaviorism, gestalt, functionalism, information-processing--as well as the learning theories associated with major intellectual figures such as Thorndike, Pavlov, Guthrie, Hull, Tolman, Skinner, Piaget, and Freud. Each theory is expounded in terms of its historical setting and the scientific problems which the theorist was addressing. The salient experimental evidence associated with each theory is also surveyed. (p. v)

In their book, the authors briefly explain simulators, films and television, programmed instruction, and computer-assisted instruction as technological aids in training and instruction. They do not specifically mention learner-controlled instruction as an entity but they do offer some evidence to support the general notion that a learner-controlled strategy leads to more effective learning than a random-order strategy (Hilgard and Bower, 1975, p. 622).


This particular text has been divided into four primary parts: (1) instructional models and objectives; (2) entering behavior and development; (3) instructional procedures and learning; and (4) performance assessment and research. Though the focus of the authors is decidedly in favor of educational institutions at the expense of other settings, much of their material can be generalized. DeCecco and Crawford (1974), early in their chapter on instructional objectives, define a task analysis and its purpose as they see it; to
them:

It is possible to not only describe but also to analyze the tasks we expect the student to perform. In this task analysis we identify classes of behavior which differ in respect to the conditions necessary for learning. In somewhat less technical language, once we have made adequate statements of the instructional objectives (or task descriptions), we can analyze these objectives by fitting them into different classes of behavior. The chief purpose of task analysis is to help the teacher determine the specific tasks the student has failed to perform. (p. 35)

The purpose of a task analysis in developing learner-controlled instruction programs is to identify all of the behavioral elements which make up the whole job for which a program is being developed. From this task analysis, acquisition, application, and criterion (or "learning," "practice," and "test") experiences ("required activities") can be devised to lead the trainee through each task and thus insure that he can perform the job. In LCI programs, if a trainee fails to perform a task, it may be because the task was not specified and thus the corresponding required activities were never presented to him.

As with Theories of Learning, by Hilgard and Bower, The Psychology of Learning and Instruction explains PI, CAI, films, and lectures as training techniques but DeCecco and Crawford do not discuss LCI as a unique training strategy.


As with the Psychology of Learning and Instruction, the bias in A Humanistic Psychology of Education is heavily in favor of formal education. Again, however, most of the ideas which the authors
present are of such a general nature that they can be applied to business or industrial settings.

Schmuck and Schmuck (1974) devote several pages of their text to programmed instruction and eventually they draw mixed conclusions. The theory which underlies PI, they say, seems logical but,

One common criticism of programmed instruction is that it may limit a student's developing repertoire of learning styles. Creativity is one psychological process that has been pointed to repeatedly as obviated by programmed instruction. Creativity involves organizing disassociated elements in a new way; students who are never given the task of organizing or synthesizing their knowledge in the course of instruction will probably not know how to proceed when given the challenge. Again, programmed instruction may be able to deal with the cognitive features of creative problem solving, but it cannot provide living situations for application. Indeed, acting creatively in relation to new understandings calls for a different view of the world of truth from that held by the behaviorists. Thorndike, and later Skinner, advocated, implicitly at least, that truth must be "stamped in" to the learner. We prefer a more dynamic view of human nature and the universe: one that asserts that the interaction between people and their environments continually changes both... (pp. 52-3)

Though LCI is by no means a perfect training format, it has the advantage over PI in that it can be structured to "provide living situations for application," or at least can provide experiences which approximate the real world.

Of particular value to A Humanistic Psychology of Education are the authors' repeated references throughout the book to innovation and feedback. It is well-written and filled with many examples to buttress the points the authors make.

*Freedom to Learn* is, of course, one of the best known texts on the subject of learning theories and the need to afford a learner a wide latitude in his learning efforts. *Freedom to Learn* is a passionate statement about the way a learner should be treated. Contrary to many of his predecessors, Rogers does not think of the learner as an empty cup into which the instructor pours knowledge. He believes that the learner should be told that his objective is less one of assimilating what an instructor presents and more one of achieving learning objectives through whatever strategies the learner believes to be most appropriate for his learning style. Rogers (1969) advocates a learning program which,

...focuses on learning, meaningful learning, by the student. It is not accidental that nothing has been said about teaching. Teaching, in its customary sense of lecturing and imparting un-requested knowledge, is irrelevant to this program.

The focus of the program is on providing a psychological climate suitable for self-directed and significant learning. This means freedom to think unusual thoughts without being squelched. It means the availability of a tremendous range of stimulating resources—community situations, teaching machines, laboratory opportunities, human beings in creative action, as well as the more usual resources of books, films, tapes and the like. Freedom, stimulation, human understanding of one's purposes and frustrations—these constitute a suitable climate for the sort of learning which makes a difference. (p. 200)

Rogers makes reference to self-directed learning in *Freedom to Learn*, but at no point discusses LCI as it is today, i.e., in effect, he has described learner-controlled instruction's main characteristic without using the name "LCI."
A learner-controlled instruction program, carefully developed, can satisfy the requirements of the program which Rogers advocates. LCI can provide a "tremendous range of stimulating resources" and "the more usual resources" as well. Though Rogers at this time is a serious advocate of freedom in learning, others in the field of training and education are perhaps more cautious. Paul Bergevin (1967) had these words about freedom:

Freedom is basic in bringing about optimum learning. But the misuse and misunderstanding of freedom can destroy the situation it might have improved. Freedom is a potentially dangerous ingredient in a learning program as well as a needed and valuable element. It can be dangerous and destructive when it is limited to only a few persons; when, for example, the administrators and leaders are free to exercise authority, but other participants in the group are free only to accept the mandates of those leaders. Further, danger is present when...participants are free to do anything they want to do but do not have the necessary discretion and experience to guide themselves. (p. 130)

Rogers' text is a necessary entry for the trainer's or educator's well-rounded reading list.


Though this text is relatively short (176 pages), Dr. Bergevin's treatment of the topic of adult education is thorough, practical, and applicable to the main theme of this project. Bergevin (1967) takes a very broad look at the need for adult education as he says, "Every adult regardless of age, mentality, race, sex, religion, size, or shape can and must continue to learn in order to fulfill his nature as a developing, maturing being." (p. 115)
Bergevin (1967) considers training programs as one facet of adult education when he remarks that,

People concerned only with training programs as distinguished from the long-term development of the learner through education, carry on the training programs as if the process of training a person to sell merchandise, do a particular job in a factory, or think and act a certain way has little to do with behavior change. But this is a fallacy. Every adult educational or training exposure, whether it is mechanistic training or the longer developmental process, involves some change in the learner. (p. 66)

Paul Bergevin, like the previous authors reviewed, seems to recognize that the characteristics of a well-developed learner-controlled instruction program are valuable to the learner. Bergevin (1967) does not specifically address LCI but does say that,

Independent learning, which is more subject to control by the learner than by others, is important for adults. It not only helps the learner know more about the subject he is pursuing, but also helps him learn to discipline himself in the learning adventure. Further, disciplined independent learning can ignite the spirit of inquiry and discovery which is the essence of real learning. Such activity helps the learner feel he can do things by himself. He can experience the thrill of independent discovery, which stimulates a desire for further learning. (p. 55)

A professional trainer or educator should find this book to be a sound foundation and guide for working with groups of adults whether in industrial, governmental, educational, medical, penal, religious, or social organizations.


Part of understanding LCI might involve some determination of
what it is not. For this reason, Programmed Instruction was included in the literature survey. Once the reader has finished the book, he should have a good knowledge of the characteristics of programmed instruction which can help him to identify how the two self-instructional strategies of PI and LCI differ. Programmed Instruction is actually a collection of articles by various authors; each article comprises a chapter of the book. Covered in the three main sections of the text are: (1) foundations for instructional programming; (2) program development; and (3) issues and problems.


Frank Wydra is probably the foremost authority on learner-controlled instruction alive today. In his article published in the December, 1978 NSPI Journal he briefly outlined the philosophy and actual mechanics of LCI. Wydra (1978) made a reference to the amount of preparation required for the development and implementation of an LCI program in comparison to the amount of preparation required for an instructor-controlled program:

Delegation of authority, though, is easier promised than practiced. The design of an LCI program requires research, analysis, definition, and validation. Efficient learning is not a casual exercise. In Instructor Controlled Instruction, preparation is a key to success. In LCI it is critical. The designer must not only anticipate the behavior of the learner, but the order and disorder of the environment. (p. 4)

Wydra (1978) also said of the rise of learner-controlled instruction that,

Tracing its roots from the infant school movement in England and the open classroom in
the United States, LCI is now being applied in the business sector in both basic training and management development programs. The applications are found across a broad range of industries. Allied Supermarkets, Inc., in a pioneer program, used LCI in the training and development of retail store managers. Mariott Hotels, Inc., has used LCI to train sales representatives in disciplines ranging from cost analysis to preparation of market reports. Connecticut General Life Insurance Company uses LCI as a basic training strategy. The Sherwin Williams Company has made extensive use of LCI in management development. (p. 4)

The "pioneer program" of Allied Supermarkets, Inc., to which Frank Wydra referred was one which he authored. That particular program was an example of an effective LCI program, as we will see in the next article to be reviewed.


In this article from the August, 1975 issue of Training magazine, Wydra covered, in some detail, the specifics of the Allied Store Management Training Program which he began to develop in late 1968.

Explained in the article are three major areas: (1) the program; (2) the environment; and (3) evaluation.

It would be appropriate here to examine the objectives, constraints, and effectiveness of the Allied Store Management Training Program. According to Wydra (1975) the objectives of the program were based on the 23 abilities which a trainee must exhibit upon completion of the program, examples of which are:

#1. Forecast sales and gross profits within 1 per cent of actual.

#5. Allocate shelf space based on customer demand.
#10. Recognize, on sight, major produce product and know the various merchandising seasons.

#15. Identify those factors that cause retail shrink.

#20. Measure and control supply usage.

#23. Schedule front end personnel according to demand. (p. 33)

Wydra (1975) also explained that the program had to operate within certain constraints or parameters:

1. The objective was capability of producing 100 graduates annually. The current rate of trainee production, which has been maintained for the last 12 months, is 110 graduates. In total 490 men have graduated from the program and we are meeting all of our manpower needs.

2. The objective was average graduate performance equal to the top 25 percent of nongraduates. Of the graduates, 72 percent were rated in the top 25 percent, and 89 percent are in the top 50 percent of their peer group. Ratings were made by the ex-trainees' immediate supervisors, six and 12 months after training.

A more tangible measure of performance is the rate at which trainees are promoted to positions of greater responsibility. The normal time span between appointment as a co-manager and promotion is 24 to 30 months. Forty-eight percent of the trainees received one or more promotions within 12 months after completion of training.

3. The objective was a training cost, including trainee salary, of $8000 or less per trainee. The actual costs have been $2400 per trainee.

Most of the cost saving has been the result of a tremendously accelerated learning speed. By guiding their own programs, trainees have reduced training time from the previous standard of 52 weeks to an average of 7.6 weeks. We feel this is a highly significant result. It was accomplished even though the trainee had the option of extending his training as long as necessary. It is even more significant in view of the trainee's performance results which exceeded those of his peer group. (pp. 36-7)

In this article, Wydra also revealed the structure of the Allied program and offered two sample required activities from that program.
Overall, Wydra presented a thorough treatment of a very successful LCI program.


This work by Dr. Laird appeared as Chapter 42 of the Training and Development Handbook - Second Edition. While it is not as detailed as the material published by Frank Wydra, the discussion of LCI by Laird has its own merits.

Laird provided the rationale for learner-controlled instruction, citing Carl Rogers as one researcher who has advocated the principles of LCI as the necessary foundation for any learning program which is to be genuinely effective with adults. Laird (1976) then offered a "definition" of LCI in three main statements:

1. A clear statement of the objectives to be achieved.

2. An explanation (or sample) of the evaluation that will be used to demonstrate satisfactory achievement of the objectives.

3. A list of resources (materials, activities, and people) available to help the learner master the objectives. This list may be referred to as a "learning map" since it describes useful "stopovers" on the route from the trainee's position at the start to his or her ultimate goal. (p. 42-2)

What Laird called a "definition" of LCI should probably more appropriately be called a "list of the three major components of learner-controlled instruction."

Laird is quite clear in his listing and explanation of the decisions delegated to learners in learner-controlled instruction: pacing of work, control of sequence, choice of materials, setting...
of learning objectives, and measurement of the degree to which learning objectives are accomplished.

In concluding the chapter, Laird lists twelve guidelines for an LCI system.

11. "Add Learner-Controlled Instruction Methods to Your Existing Programs!" from Training (February, 1979).

This brief article, essentially a monograph, highlights the Mogul Corporation's favorable experience with learner-controlled instruction as applied to their sales training effort. Roy Handwerk, Director of Marketing for Mogul, found:

...that LCI trained sales representatives consistently rank higher than other sales representatives in product knowledge. What's more, both trainees and sales managers prefer LCI to classroom training.

The monograph states that the total amount of time involved in the changeover of Mogul's sales training program to an LCI format was less than a week and that the only additional cost was the "...required training of a manager from each geographic division."


This very brief article from Training (January, 1979) is a recap of an adult learning research review by Allen Tough, professor of adult education at the Ontario Institute for Studies in Education, Toronto.

Tough reviewed in excess of twenty studies which had been conducted over the last decade. Several intriguing conclusions formed the essence of the literature survey, not the least of which was
that,

People who prefer learning on their own to learning in courses do so for the following reasons: (a) desire to set own learning pace, (b) desire to keep learning style flexible and easy to change, (c) desire to use own style of learning, (d) desire to put own structure on learning... (p. 8)

Zemke's article seems to be an efficient summary of what appears to have been a very thorough literature survey by Allen Tough.


In this article from the October, 1978 issue of the *Training and Development Journal*, Randall describes the pros and cons of the following methods of training: (1) discussion; (2) demonstration-performance; (3) dramatization; (4) role play; and (5) problem situations or case studies. Randall completes the work with a listing of factors to be considered in selecting the method(s) most suitable for any given training requirement. As seen from his statements on page two of this project, Randall prefers almost any training method over the lecture approach.


This is a very substantial work and appears as Chapter 19 of the *Handbook of Industrial and Organizational Psychology*, edited by Marvin D. Dunnette. An excellent summary of the chapter is provided by Dunnette (1975):

The area of personnel training in organizations is reviewed, with the conclusion that little systematic psychological knowledge about
the field has been developed. An open-systems viewpoint is employed to help clarify the nature of the training process. This analysis moves from a review of the skill acquisition system at the level of the individual trainee, to the supra-system of the training department, and finally to the total organizational system in which the training department operates. The signal and maintenance inputs, systems operator, outputs, and feedback loops for each of these systems are discussed. A final section reviews various popular training methodologies, classifying them into content, process, and mixed techniques. Research needs in the area of personnel training are reviewed in the concluding section. (p. 829)

Particularly useful to this author was Hinrichs' classification of popular training methodologies. "Personnel Training" furnishes the reader with a solid grounding in the approaches to training in the business/industrial sector.


This program is the learner-controlled instruction program to which Wydra referred in his articles in Training and NSPI Journal. It is an immense program, filling two four-inch three-ring binders. Much of the Company X Sales Orientation and Training Program which appears in the appendix of this project was patterned after this notable work.


The above two learner-controlled instruction programs, while not as large as the Allied program, are very fine examples of LCI.
Some of the ideas which this author utilized in developing the Company X Sales Orientation and Training Program were borrowed from these two programs.


The above books and articles (numbers 18-24) are cited in this literature survey as small amounts of material from these sources were used in the development of this project. Each provided something, however small, and each is to be considered suggested reading for the LCI developer.
CHAPTER IV

LCI DEVELOPMENT

This chapter provides a base of knowledge from which the characteristics of learner-controlled instruction and the logic which underlies LCI can be extracted.

Three essential components comprise this chapter: (1) an outline of the elements of the process by which LCI programs are developed, with specific examples keyed to the Company X Sales Orientation and Training Program (see Appendix); (2) an explanation of the way in which learner-controlled instruction programs can be integrated into an overall system of training, and (3) an analysis of how the learning process is structured into each "required activity" of a learner-controlled instruction program.

Development Process

At this point, the reader should be able to see that the most effective method of knowledge and skill acquisition for adults is one which emphasizes the learner rather than the trainer, allows the learner to make decisions which impact his learning, accommodates his unique style of learning, and provides him with prompt feedback on his performance. Learner-controlled instruction exhibits these general characteristics. As Laird (1976) explained,

Learner-controlled instruction (LCI) is merely a learning-teaching system which involves the learner in a number of key decisions about how learning
will take place. These decisions will involve such issues as the pace at which learning progresses, the sequence in which the learning steps are achieved, the methods and materials used in this process, the objectives of the learning, and the measurement and evaluation of the learning. (p. 42-1)

In a business or industrial setting, assuming that a detailed front-end analysis has been executed which confirms the need for training as the most effective strategy for performance improvement, the first step in developing an LCI program is to perform a task analysis of the job for which individuals are to be trained. A task analysis simply involves listing all of those things which a person in a particular job must do or know in order to be successful in that job. (Refer to Figure 1, p. 33.) In performing the task analysis for the position of motor carrier Sales Representative, the motor carrier which served as the source of information was one of the ten largest motor carriers in the United States, based on gross revenue.¹

The task analysis for the position of motor carrier Sales Representative included interviews with, and observation of, successful motor carrier Sales Representatives, interviews with various Corporate Sales personnel, an investigation into current printed materials relevant to selling techniques and the sale of motor carrier service. Because a task analysis forms the base for an LCI program, it must be comprehensive and detailed.

¹Because a company of this nature provided the base for the Company X Sales Orientation and Training Program, the program will likely be most suited for motor carriers of similar size and structure. The sample learner-controlled instruction program could be used to train Sales Representatives for relatively small motor carriers, but some program modifications would then be indicated.
The second step of LCI development is to list all of those resources to which a learner could go to gather information about each of the tasks identified in the task analysis. Resources take two general forms: "documents" or "people." Bergevin (1967) stated that,

> The term "resources" is used here to mean materials, such as books, charts, graphs, films, maps, newspapers, and magazines, from which the adult learner can obtain information to supplement his learning experiences. Resources also include physical facilities like buildings, rooms, and desks. In addition to these kinds of resources, there are resource persons who are versed in certain areas of knowledge and who may provide useful information. These persons may be called upon at appropriate times to share their knowledge with the other participants in the learning group.

Resource persons and resource materials are usually available for all kinds of adult learning programs. The proper selection and use of resources can be an interesting and rewarding activity for alert adult educators and participants who are willing to expend some effort. The adroit use of resources can keep interest at a productive level. (pp. 149-50)

To the extent that the LCI program developer can assemble an exhaustive list of resources, the trainee will have a large number of options as to how he will learn the skills demanded by the program. Thus, the development of a comprehensive list of people and document resources can promote a learner's freedom in learning. For examples of resources used in the Company X Sales Orientation and Training Program, see the Resource List starting on page 57.

The third step of LCI program development is the development of projects called "required activities" which are structured to lead the trainee to learn each of the skills of the job by forcing him to go to, or "access," the resources. A required activity may instruct
the learner to describe a procedure relevant to the job, answer a questionnaire, actually perform a small segment of the job, or carry out any other type of activity the program developer may specify. There are 51 required activities in the sample LCI program, divided into ten sections. Each of these projects is designed to guide the trainee to learn one or more tasks of the job of motor carrier Sales Representative; each of the program sections deals with a single broad area of that job.

All of the required activities in any learner-controlled instruction program will fall into three categorical types: learning, practice, and test activities. These are sometimes referred to as acquisition, application, and criterion activities, respectively. See Figure 1, page 33.

A learning or acquisition activity is one designed to introduce a learner to material which may be new or unfamiliar to him. A prime example of this type is Required Activity #21 - "Tariffs" on page 113. The questionnaire associated with this activity focuses upon building the learner's familiarity with new concepts: tariffs, rates, and procedures by which tariffs are established. In order to answer Questionnaire J, the learner may have to read the appropriate sections of the Traffic Guide and/or talk to some or all of the individuals listed under the "Resources" subheading of the required activity sheet.

At this point, the reader should pay particular attention to the "Activity Description" subheading of Required Activity #21. Notice that the learner is permitted to use his own knowledge or his
Figure 1: LCI Development Process

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experience to complete the project, if he believes this would be appropriate. In the event that a trainee can complete a required activity without having to access any resources, that required activity is then serving to certify that the trainee has already mastered those skills associated with that project.

An application or practice activity is a project which is designed to allow a learner to begin to expand upon or apply the knowledge gained in a related learning activity. An example of an application activity from the Company X Sales Orientation and Training Program, appearing on page 117, is Required Activity #22 - "Requesting Tariff Changes." In this particular instance, once a sales trainee has gained the basic knowledge about tariffs and rates, he is asked to describe in detail the procedure that he should follow in order to request a tariff change for a customer.

The final type of activity is that of a criterion or test activity, an example of which is Required Activity #23 - "Tariff Change Documents," appearing on page 118. As the reader can see, the required activity sheet is followed by a narrative description of a customer who is currently using the Sales Representative's motor carrier to ship a given commodity at a set rate, with the customer expressing a desire for a lower rate to ship that commodity. The trainee, after obtaining an actual copy of the form which a Sales Representative would fill out in requesting a tariff change, must then complete that form accurately. At this point, once the trainee has successfully completed this criterion activity, the program administrator can be very certain that the trainee has mastered one
portion of a motor carrier Sales Representative's job—that of requesting a tariff change for a customer.

Certain required activities of learner-controlled instruction programs may also be categorized as "acclimation" activities. The term here refers not to the instructional objectives of the projects but to their level of difficulty. Acclimation activities (which will also be acquisition, application, or criterion activities) appear at the beginning of a program and are simple enough to help the learner to become comfortable with the mechanics of the program and to bolster his feelings of success and accomplishment. The activities in Section One of the Company X Sales Orientation and Training Program are acclimation activities.

Overall Model

To see how a learner-controlled instruction program best fits into a company's training system, see Figure 2 on page 36.

The first step in implementing a finished LCI program is that of selection of trainees. Candidates may be drawn from within the company, from another company within the same industry, or perhaps from a general pool of job applicants.

After the trainees have been chosen, the next step is to orient them to the program. At this stage, the learners are given explicit instruction as to their duties and expected behavior while participating in the program. Responsibilities of all individuals involved in the training effort are outlined in detail. During the second step of the Overall Model, the Training Administrator should review
Figure 2: LCI Overall Model

1. SELECTION
2. ORIENTATION
3. PRE-MEASUREMENT
4. ACCLIMATION ACTIVITIES
5. BASIC ACTIVITY MODEL
6. PERIODIC FEEDBACK EXERCISE
7. POST-MEASUREMENT
8. ASSIGNMENT

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each of the sections of the program with the learners and answer any questions they may have about the program content or administration procedures.

The third step of the Overall Model is labeled "pre-measurement." It is here that the trainee compares his present knowledge and abilities against the expectations of the program to formulate a "learner's map," a master schedule which he will attempt to follow in completing the required activities. Trainees are given the freedom to complete the required activities in any sequence they feel would be most appropriate for them, i.e., they are not necessarily expected to begin with Required Activity #1 and work sequentially to the end of the program. The program developer, however, should make every effort to assemble the required activities into a sequence which will lead to rapid learning from beginning to end. In the Company X Sales Orientation and Training Program a "Program Matrix" begins on page 59. This matrix or "Suggested Flow of Training Activities" is an example of a reasonably efficient guide to program completion. It should be noted at this point that a trainee entering a learner-controlled instruction program with some degree of related knowledge and/or experience may well be able to complete the program more quickly than another trainee who is a novice in that field.

Step four, "acclimation activities," discussed previously, refers to those projects which generally comprise the first few required activities of a learner-controlled instruction program. These are simpler activities which can usually be quickly and successfully mastered.
Step five, the "Basic Activity Model," is the major component of the Overall Model of learner-controlled instruction. Most of the required activities are patterned after the Basic Activity Model. The activities are designed around that framework, or learning diagram, which makes learner-controlled instruction effective. More detailed attention is given to the Basic Activity Model in the next section of this chapter.

Step six, "periodic feedback exercise," refers to the final evaluation of a trainee by those individuals who have monitored his progress throughout the program. The trainee may be asked to take a test and/or be quizzed thoroughly before he is graduated from the program.

The final step to be taken by the Training Administrator is one of "assignment." At this point, a graduated trainee is placed in the job for which he prepared himself.

Basic Activity Model

Much of the effectiveness of a learner-controlled instruction program can be attributed to the learning process structured into each of its required activities. A flowchart representing this process appears as Figure 3 on page 39.

The first step of the learning process, "pre-measurement," is basically equivalent to step three of the Overall Model. In this step, the learner must read a specific required activity and compare his present level of knowledge and/or skill against the level of knowledge and/or skill required for mastery of the activity. Any
Figure 3: LCI Basic Activity Model

- Pre-Measurement
- Objective Identification
- Research Needed?
  - Yes → Research
  - No → Change-Producing Action

- Post-Measurement
- Evaluation
  - No → Satisfactory?
    - No
    - Yes → New Project
  - Yes→ New Project
deficiencies will suggest the amount of research the learner must conduct for that project; therefore, it is during the pre-measurement step that the learner makes a determination of the extent to which he can already perform the requirements of the activity.

Step two, "objective identification," is the step at which the learner determines specifically what he must do to successfully complete the required activity. After reading the "Activity Description" section of the required activity sheet, the learner will be able to assess the "gap" in knowledge or skill he must fill, i.e., the difference between his current ability and the level demanded by that project.

At the third step of the Basic Activity Model, the learner must make a judgement as to which people and/or document resources he will go, if to any, to learn about the task in question. If research is necessary, the learner will first be directed to documents which can be read without disturbing the daily routines of others. Later the learner may go to individuals if more information is needed. If, on the other hand, the learner can complete a required activity by using his own knowledge or experience as a reference, he is permitted to do that.

Step four, "change-producing action," is the actual execution of the required activity. At the end of this step, the learner will have produced or altered something which can then be evaluated against some pre-determined standard. Following this step, a learner's behavior or way of thinking should also be changed, i.e., he will have "learned."
It is during step five, "post measurement," that the learner's work is checked. In executing this step, the learner reads the "Measurement and Standards" section of the required activity sheet to determine who will be grading the work. The trainee then submits the work and corresponding required activity sheet to that individual who will examine the accuracy of the end product.

The evaluator or "source of verification" checks the work to verify that the project has been accurately completed (step six, "evaluation"). Generally, the evaluator is given accept/reject criteria in the "Measurement and Standards" section of the required activity sheet. If the work has more than the acceptable number of errors, it will be returned to the learner for corrections. If the work is found to be acceptable, the evaluator will initial the corresponding required activity sheet and return it any paperwork to the learner. A listing of the sources of verification for each of the required activities on the sample LCI program is found on page 62.
CHAPTER V

CONCLUSIONS

Because of its unique characteristics, learner-controlled instruction has several distinct advantages over other training strategies more frequently applied to adult learners. In particular, an ICI program:

1. Recognizes individual learning requirements.
2. Allows trainees to learn at a maximally efficient rate.
3. Reduces training time.
4. Reduces training cost.
5. Reduces turnover.
6. Promotes affirmative action compliance.
7. Allows program flexibility.

Because learner-controlled instruction programs are self-paced, i.e., time objectives are set by the learner, they accommodate differences in learning requirements of learners. Learners do not work within a group; therefore, no learner is held back by slower learners and none are rushed through material too quickly by others who may be learning at faster rates. Trainees learn at their most efficient rates.

In learning at the most efficient rate is the fact that trainees are free to choose their own sequences for completion of the required activities of the program. Some trainees may find it best to begin with the first activity of the program and proceed sequentially to the end of the program. Other trainees may work through the program...
in a seemingly random fashion.

Because of the first two advantages, training time is greatly reduced. A striking example of this was the Allied Supermarket Store Management Training Program. Frank T. Wydra (1975) said of this program that,

Pretraining knowledge test scores average 29 percent and post-training scores average 87 percent. Average learning time has been reduced from 52 to 7.6 weeks. The creation of an environment conducive to learning seems more important than control of the trainee. (p. 39)

Since training time is reduced, cost is reduced also. The reduction in the number of "trainers" or "lecturers" needed also lowers cost. Existing employees are used to provide instruction, and then only when requested by a learner.

The fifth issue to be addressed is that of turnover. Poorly trained employees generally exhibit substandard performance. Those individuals who would like to perform their jobs well but cannot are bound to feel inadequate and frustrated. Quitting is a common result for such workers. Carefully developed learner-controlled instruction programs may help reduce employee turnover where the cause of that turnover is poor employee performance.

A sixth advantage of LCI is its ability to promote affirmative action compliance. Because LCI recognizes individual learning requirements, it is uniquely suited for this application.

Most learner-controlled instruction programs are published in three-ring binders. Required activities which may later be found to be less useful can be easily removed, while new required activities
can be added simply by snapping open the binder and inserting them. This, of course, is evidence that these programs are flexible.

Finally, because learners have access to the resources they need, learning need not be limited to a single, central location. Documents are almost always portable and resource individuals can usually be accessed in person or by a telephone. Learner-controlled instruction programs are ideally suited for geographically-dispersed companies.

Learner controlled instruction has many advantages but it is not perfect. Though it would probably be found to be suitable for most training situations, it is not a panacea for performance problems. In considering which training strategy to use, the program developer must consider the range of skills to be taught. Programmed instruction, films, lectures, and other less elaborate approaches are indicated when the range of skills to be taught is narrow. Learner-controlled instruction should be implemented when the range of skills to be imparted is very broad, i.e., when the skills of an entire job are to be taught.
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Add learner-controlled instruction methods to your existing programs! Training, February 1979, p. 50.


Wydra, Frank T. Learner controlled instruction. NSPI Journal, 1978, 17(10), 4-5; 10.


APPENDIX

Company X Sales Orientation and Training Program
A Learning Program for Motor Carrier Sales Representatives
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**Administrative Forms**

- Weekly Schedule
- Daily Activity Log
- Sales Trainee Evaluation
GENERAL INTRODUCTION

1. Program Purpose and Strategy.

   This program has been designed to provide you with much of the knowl-
   edge, skill, and experience necessary to become an effective Company X
   Sales Representative.

   In this program, you shoulder the responsibility for learning. You
   control the how, when, how much, and even the if of learning. You initiate
   and direct your own learning activities to suit your own objectives. You
   utilize those resources which best complement your style of learning.

   While you are participating in this program, you will be required to
   complete numerous projects. These projects, called Required Activities,
   are designed to help you learn a skill you will find necessary to become a
   successful Company X Sales Representative. The effort you put into each
   assignment will determine how much you learn.

2. Objective of the Trainee.

   Your primary objective is the successful completion of all training
   activities. You will be involved in the on-going operation of the terminal
   only as it relates to the specific activities of the program.

3. Responsibilities of the Trainee.

   Toward the end of each week, you will meet with the Terminal Manager to
   plan the activities of the following week. This will allow the Terminal
   Manager, when possible, to adjust the schedule of his staff to accomodate
   your activities. In the event that you and the Terminal Manager are unable
   to reach an agreement, the schedule will be determined by the Division Sales
   Manager and the Training Administration Specialist.
Throughout each day, you will complete a Daily Activity Log. This will indicate activities worked on and time expended on each.

Another of your responsibilities will be to develop cooperation with others. You will not be a regular member of the terminal staff and, as such, will have no formal authority in the terminal. It will, therefore, be one of your primary responsibilities to develop good working relationships with the terminal's personnel, so that you will have the cooperation and respect needed to complete your assigned activities.

Your sole responsibility during this training program is the completion of all Required Activities and related work specified by this program. All of your efforts should be directed only toward achieving this end.

4. Training Terminal.

Your training terminal and surrounding sales territory will be to you what a laboratory and proving grounds are to a researcher. It is here that you will acquire the majority of the knowledge and skills from the program. The training terminal provides the setting in which you will practice the skills you develop.

5. Responsibilities of the Terminal Manager.

The Terminal Manager will be responsible for providing you with the opportunities to complete your assigned activities. He will do this by:

a) Reviewing the activities to be completed.
b) Acting as a resource and a guide to resources.
c) Helping you to schedule your activities.
d) Developing the terminal's schedule to accommodate your activities, as much as possible.

At the end of each week, the Terminal Manager will complete an evaluation of your progress. This evaluation will include:

a) An assessment of your proficiency regarding the skills you learned.
b) An evaluation of your management skills.
c) An assessment of your ability to use time efficiently.

6. Division Sales Manager's Responsibilities.

The Division Sales Manager responsible for the terminal at which you are training will serve as an expert (one to whom you may go for information) and as final "sign-off" authority for the successful completion of each activity. He will also help you resolve any difficulties encountered in the completion of each activity.

7. Responsibilities of the Training Administration Specialist.

The Training Administration Specialist will give final approval to your schedule of activities. He will, in conjunction with the Division Sales Manager, mediate any difficulties that cannot be resolved at the terminal level. In addition, he will assist you in locating resources.

8. Organization of Activities.

The Required Activities have been divided into sections. Each section deals with a separate phase of a Company X Sales Representative's duties. Some activities may seem unrelated and somewhat meaningless when taken by themselves. Try to view each section as a complete unit and determine how the activities fit together. The activities and sections are listed in the Table of Contents on page 48.

In addition to being divided into sections, the Required Activities have been arranged into a sequence which will lead to rapid learning. Most of the time you will be working on several activities at the same time. Some activities may require many hours of your time each day while others may only require an hour or two total. Your judgement will determine which activities you should be working on at a given time.
Pre-Program Activities

1. Your first involvement in the Sales Orientation and Training Program will be to verify, along with the trainee, that the documents specified in the Resource List are available to the trainee. You should supply any resources which are not in the training package, but which are available at your terminal. If any other items have been omitted which you cannot supply, promptly notify the Training Administration Specialist.

2. Answer those questions which are posed by the trainee which you can confidently answer. Refer the others to the Training Administration Specialist.

Within-Program Activities

1. You will be responsible for providing the trainee with opportunities to complete his assigned activities. This will be accomplished by:
   a) Reviewing the activities to be completed by the trainee.
   b) Acting as a resource and as a guide to resources.
   c) Helping the trainee to schedule his activities.
   d) Developing the terminal's schedule to accommodate the trainee's schedule, as much as possible.

2. Toward the end of each week, you will meet with the trainee to assist him in planning his activities of the coming week. This will allow you, when possible, to adjust the schedule of your staff to accommodate his activities. In the event that you and the trainee are unable to reach an agreement, the trainee's schedule will be determined by the Division Sales Manager and the Training Administration Specialist.

3. At the end of each week, the trainee will furnish you with a copy of each of his Daily Activity Logs for the past week and a copy of his Weekly Schedule for the coming week. After you review these, file them with any other program-related materials.
4. At the end of each week, you will complete a Sales Trainee Evaluation form, measuring the trainee's progress. Your evaluation should include:

   a) An assessment of the trainee's proficiency regarding the skills he acquired.
   b) An evaluation of the trainee's management skills.
   c) An assessment of the trainee's ability to use time efficiently.

   Make a photocopy of this evaluation form. Promptly send it to the Training Administration Specialist. You may also wish to make a second copy to be given to the trainee if you feel this is appropriate.

5. At the end of each week you will meet formally with the trainee to review those Required Activities which he completed that week. This meeting does not preclude any informal meetings between the two of you.

6. Every two weeks the trainee will be meeting with your Division Manager and/or your Division Sales Manager to check the trainee's completed work. You should plan to attend this meeting whenever possible and appropriate.
Pre-Program Activities

1. Your first step of this program is to verify that your training package is complete. Turn to the Resource list on page 57. As you locate each of the documents listed, place a check mark in the appropriate blank. If you are unable to locate any document, notify the Terminal Manager and the Training Administration Specialist. It is important that you have all of the necessary materials before you begin any activities.

2. Read the General Introduction and all specific instructions. By doing so, you will gain an overview of the organization of the program and the responsibilities of the personnel involved.

3. Read all Required Activities thoroughly. As you read each, pay particular attention to the "Reference Time" at the bottom of each sheet. The time specified is the approximate time you may need to complete that activity.

4. Your next step is to fill in the "Projected" section of the Time Plan at the bottom of the Required Activity sheets. On page 59 you will find a Program Matrix which proposes one sequence in which Required Activities might be completed by the trainee who is completely unfamiliar with Company X, with the motor carrier industry, and with sales. Depending upon your level of knowledge in these areas, you may wish to follow the sequence of Required Activities proposed by the Program Matrix, or you may wish to complete the Required Activities in whatever sequence you feel will be most beneficial to you. In either case, you should tackle the simpler Required Activities before progressing to the more difficult ones. Once you have decided upon a sequence of Required Activities, indicate the month and day you intend to begin and complete each. Do this for each of the Required Activities before you proceed.
5. Remove the blank "Weekly Schedule" form from the "Administrative Forms" section at the back of this program and make a copy of it. Using your best judgement of what you can accomplish during the coming week, fill out the Weekly Schedule form that you copied (save the original for future weeks). Make maximum use of your time, but do not tackle more than you can accomplish. Make an extra effort to live up to your schedule.

6. Make two copies of your completed Weekly Schedule form. Give one to your Terminal Manager and promptly send the other to the Training Administration Specialist.

Within-Program Activities

1. On your first day of the actual program, remove the "Daily Activity Log" form from the "Administrative Forms" section at the back of this program and make several copies of it. Begin your first day's Required Activities. As you work throughout the day, keep track of all personal activity on the form. Indicate your work on the training program, lunchtime, and anything else you do during the day. Keep a Daily Activity Log for each day you are in training. At the end of each week, make copies of each Daily Activity Log you completed that week and promptly send the copies, along with a copy of your Weekly Schedule for the next week, to the Training Administration Specialist. File all completed Daily Activity Logs in a convenient place.

2. At the end of each week, you will meet formally with the Terminal Manager to review those Required Activities which you completed that week and to plan your coming week. This will allow the Terminal Manager, when possible, to adjust the schedule of his staff to accommodate your activities. In the event that you and the Terminal Manager are unable to reach an agreement, your schedule will be determined by the Division Sales Manager and the Training Administration Specialist.
3. Every two weeks you will meet with your Division Sales Manager and/or Division Manager. This will give them an opportunity to check your completed Required Activities and answer any questions you may have.

4. For activities which are to be checked by the Terminal Manager or other terminal personnel, arrange to have them checked as soon as you are finished.

5. As you check your completed work with the appropriate sources of verification, have each initial the Required Activity sheets he checks. When you have completed a section of the program (Required Activity sheets initialed), send the entire section to the Training Administration Specialist. He will perform a final review of your work and return it to you.

Post-Program Activities

1. When you have finished all Required Activities in the program, notify the Training Administration Specialist.

2. Prepare to meet with the Training Administration Specialist for your final program evaluation.
COMPANY X
SALES ORIENTATION AND TRAINING PROGRAM

RESOURCE LIST

Listed below are all of the "document" and "people" resources you will need to complete this program:

Company X Resources

1. Annual report.
2. Corporate policy memoranda.
4. Equipment inventory report.
5. Mail distribution roster.
7. Master equipment listing.
8. Organization chart.
9. Quarterly report.
11. Sales bulletins.
12. Sales maps.
13. Sample Telephone Sales Schedule instructions.
14. Sample Telephone Sales Schedule form.
16. Welcome brochure.

External Document Resources


2. Local Chamber of Commerce material.


People Resources

1. Billing Clerk.
2. Director of Revenue Accounting.
3. Division Manager.
4. Division Sales Manager.
5. General Office Sales Personnel.
6. Local Chamber of Commerce Personnel.
7. Personnel Manager.
8. Sales Representatives.
9. Terminal Manager.
10. Terminal Personnel.
11. Traffic Manager.

NOTE: Job titles may vary from those listed above.
<table>
<thead>
<tr>
<th>Activity</th>
<th>Description</th>
<th>Week</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Company X History and Structure</td>
<td>X</td>
</tr>
<tr>
<td>2</td>
<td>Corporate Office Organization</td>
<td>X</td>
</tr>
<tr>
<td>3</td>
<td>Operations Organization</td>
<td>X</td>
</tr>
<tr>
<td>4</td>
<td>Sales Organization</td>
<td>X</td>
</tr>
<tr>
<td>5</td>
<td>Types of Operating Authority</td>
<td>X</td>
</tr>
<tr>
<td>6</td>
<td>Company X's Operating Authority</td>
<td>X</td>
</tr>
<tr>
<td>7</td>
<td>Origin and Growth of the Truck Transportation Industry</td>
<td>X</td>
</tr>
<tr>
<td>8</td>
<td>General Operations of the Truck Transportation Industry</td>
<td>X</td>
</tr>
<tr>
<td>9</td>
<td>Regulation of the Motor Carrier Industry</td>
<td>X</td>
</tr>
<tr>
<td>10</td>
<td>Channels of Distribution</td>
<td>X</td>
</tr>
<tr>
<td>11</td>
<td>Terminal Organization</td>
<td>X</td>
</tr>
<tr>
<td>12</td>
<td>Terminal Equipment</td>
<td>X</td>
</tr>
<tr>
<td>13</td>
<td>O.S.&amp; D. and Claims</td>
<td>X</td>
</tr>
<tr>
<td>14</td>
<td>Truck Mail</td>
<td>X</td>
</tr>
<tr>
<td>15</td>
<td>Cartage, Interline, and Interchange</td>
<td>X</td>
</tr>
<tr>
<td>16</td>
<td>Company X Account Coding</td>
<td>X</td>
</tr>
<tr>
<td>17</td>
<td>Granting Customer Credit</td>
<td>X</td>
</tr>
<tr>
<td>18</td>
<td>Bills of Lading</td>
<td>X</td>
</tr>
<tr>
<td>19</td>
<td>Delivery Receipts</td>
<td>X</td>
</tr>
<tr>
<td>20</td>
<td>F.O.B. Terms</td>
<td>X</td>
</tr>
<tr>
<td>Activity</td>
<td>Description</td>
<td>Week</td>
</tr>
<tr>
<td>----------</td>
<td>-------------------------------------------------------</td>
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<td>Tariffs</td>
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<td>22</td>
<td>Requesting Tariff Changes</td>
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<tr>
<td>23</td>
<td>Tariff Change Documents</td>
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</tr>
<tr>
<td>24</td>
<td>Sales Form Identification</td>
<td>4 X</td>
</tr>
<tr>
<td>25</td>
<td>Traffic Leads</td>
<td>1 X</td>
</tr>
<tr>
<td>26</td>
<td>Sales Form Use</td>
<td>2 X</td>
</tr>
<tr>
<td>27</td>
<td>Company X Sales Quotas</td>
<td>3 X</td>
</tr>
<tr>
<td>28</td>
<td>Identification of Terminal Sales Quotas</td>
<td>4 X</td>
</tr>
<tr>
<td>29</td>
<td>Time and Territory Management</td>
<td>1 X</td>
</tr>
<tr>
<td>30</td>
<td>Telephone Sales</td>
<td>2 X</td>
</tr>
<tr>
<td>31</td>
<td>Telephone Sales Projections</td>
<td>3 X</td>
</tr>
<tr>
<td>32</td>
<td>Activity Log</td>
<td>4 X</td>
</tr>
<tr>
<td>33</td>
<td>Activity Log Evaluation</td>
<td>1 X</td>
</tr>
<tr>
<td>34</td>
<td>Determining Appointment Desirability</td>
<td>2 X</td>
</tr>
<tr>
<td>35</td>
<td>Sequencing Sales Calls</td>
<td>3 X</td>
</tr>
<tr>
<td>36</td>
<td>Sequencing Sample Sales Calls</td>
<td>4 X</td>
</tr>
<tr>
<td>37</td>
<td>Sales Territory</td>
<td>1 X</td>
</tr>
<tr>
<td>38</td>
<td>Sales Territory Division</td>
<td>2 X</td>
</tr>
<tr>
<td>39</td>
<td>Knowledge of the Customer</td>
<td>3 X</td>
</tr>
<tr>
<td>40</td>
<td>Knowledge of a Selected Active Customer</td>
<td>4 X</td>
</tr>
<tr>
<td>41</td>
<td>Knowledge of a Selected Potential Customer</td>
<td>1 X</td>
</tr>
<tr>
<td>42</td>
<td>Setting Call Objectives</td>
<td>2 X</td>
</tr>
<tr>
<td>43</td>
<td>Opening the Sales Call</td>
<td>3 X</td>
</tr>
<tr>
<td>44</td>
<td>Features, Advantages, and Benefits of Service</td>
<td>4 X</td>
</tr>
<tr>
<td>45</td>
<td>Sales Presentation</td>
<td>1 X</td>
</tr>
<tr>
<td>46</td>
<td>Effective Listening</td>
<td>2 X</td>
</tr>
<tr>
<td>Activity</td>
<td>Description</td>
<td>Week</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>47</td>
<td>Closing the Sales Call</td>
<td>X</td>
</tr>
<tr>
<td>48</td>
<td>Sales Call Evaluation</td>
<td>X</td>
</tr>
<tr>
<td>49</td>
<td>Sales Aids</td>
<td>X</td>
</tr>
<tr>
<td>50</td>
<td>Local Organization Membership</td>
<td>X</td>
</tr>
<tr>
<td>51</td>
<td>Appropriate Business Image</td>
<td>X</td>
</tr>
</tbody>
</table>
## SOURCES OF VERIFICATION

<table>
<thead>
<tr>
<th>Source</th>
<th>Required Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division Manager</td>
<td>3</td>
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<tr>
<td>Division Sales Manager</td>
<td>1, 2, 4, 6, 10, 13, 16, 19, 20, 21, 22, 23, 24, 25, 26, 27, 29, 30, 34, 35, 36, 37, 38, 39, 42, 43, 44, 45, 46, 47, 49, 51</td>
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<tr>
<td>Training Administration Specialist</td>
<td>7, 8, 18, 33, 48</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>31, 32</td>
</tr>
<tr>
<td>Terminal Manager</td>
<td>5, 9, 11, 12, 14, 15, 17, 28, 40, 41, 50</td>
</tr>
</tbody>
</table>
SECTION 1

Company Background

The activities in this section deal with the history, structure, organization, and operating authority of Company X.
REQUIRED ACTIVITY 1 - "Company X's History and Structure."

ACTIVITY DESCRIPTION:

Answer Questionnaire A, "History and Structure of Company X." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Programmed Instruction Course in Truck Transportation
Company X Welcome Brochure
Company X Annual Report
Company X Quarterly Report
Company X Directory of Terminals
Company X Organization Chart

People - Terminal Manager
Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 10 errors of any type will be noted.

TIME PLAN:

<table>
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<tr>
<th>PROJECTED</th>
<th>ACTUAL</th>
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<tr>
<td>Beginning Date:</td>
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<tr>
<td>Completion Date:</td>
<td></td>
</tr>
</tbody>
</table>

REFERENCE TIME: 4 hours

NOTES:
Questionnaire A, "History and Structure of Company X."

1. Who is the President of Company X?

__________________________________________________________________________

2. What is the address of the Corporate Office of Company X?

__________________________________________________________________________

3. List the Vice-Presidents at the Corporate Office and their titles (areas of responsibility).

<table>
<thead>
<tr>
<th>Name</th>
<th>Title (Responsibility)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

4. Who is your Regional Vice-President?

__________________________________________________________________________

5. Who is your Division Manager?

__________________________________________________________________________

6. Who is your Division Sales Manager?

__________________________________________________________________________

7. List the name(s) and title(s) of the individual(s) to whom you report directly.

__________________________________________________________________________

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8. To whom do(es) they (he) report?

__________________________________________________________

9. In your area, what motor carriers are Company X's major competitors?

__________________________________________________________

__________________________________________________________

__________________________________________________________

__________________________________________________________

10. In what year did Company X originate?

__________________________________________________________

11. How many terminals did Company X operate during its first year?

__________________________________________________________

12. What 1935 event involving the Interstate Commerce Commission (I.C.C.) had a significant impact upon existing motor carriers?

__________________________________________________________

__________________________________________________________

__________________________________________________________

__________________________________________________________

13. List the names and years of Company X's major acquisitions since its first year of operation.

<table>
<thead>
<tr>
<th>Year</th>
<th>Acquisition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
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<tr>
<td></td>
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</tr>
</tbody>
</table>
14. What was the profit percentage of Company X for the last fiscal year?
   ________ %
   For the previous year? ________ %

15. For the last fiscal year, what was the earnings-per-share for Company X's common stock? ________
   For the previous year? ________

16. What was the total Net Sales and Revenue figure for Company X for the last fiscal year? ________
   For the previous year? ________

17. What was the total Net Income of Company X for the last fiscal year?
   ________
   For the previous year? ________

18. Into how many divisions (geographic) is Company X divided? ________

19. In which division is your terminal located? ________

20. Approximately how many cities and towns does Company X serve directly? ________

21. In how many states does Company X operate? ________

22. List the states in which Company X operates or holds operating authority.
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
23. How many terminals does Company X currently operate? _________

24. Over how many route miles of certified authority does Company X operate? _________

25. How many tractors and trailers make up Company X's fleet?
   Tractors _________ Trailers _________

26. How many cubic feet of carrying capacity does Company X's fleet provide? _________

27. Approximately how many miles does Company X's fleet log annually? _________

28. Approximately how many people are employed by Company X? _________

29. What is Company X's average length of haul? _________

30. With respect to gross sales, Company X ranks at the _______ percentile of all United States motor carriers.
REQUIRED ACTIVITY 2 - "Corporate Office Organization."

ACTIVITY DESCRIPTION:

Draw an organization chart for Company X's corporate office, showing the names, job titles, and major responsibilities of each department head.

RESOURCES:

Documents - Mail Distribution Roster
Company X Organization Chart
Corporate Policy Memoranda

People - Terminal Manager
Division Manager
Personnel Manager

MEASUREMENT AND STANDARDS:

Chart will show the position and reporting relationship of each individual listed on the current Mail Distribution Roster. Job titles will reflect major duties. When checked by your Division Sales Manager, no more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ________________________________ ________________________________
Completion Date: ________________________________ ________________________________

REFERENCE TIME: 2 hours

NOTES:
REQUIRED ACTIVITY 3 - "Operations Organization."

ACTIVITY DESCRIPTION:

Draw an organization chart for the operations segment of Company X. For all salaried management employees (Division Managers and above) show the name, job title, and major responsibilities of each.

RESOURCES:

Documents - Company X Directory of Terminals
Company X Organization Chart
Corporate Policy Memoranda

People - Terminal Manager
Division Manager
Personnel Manager

MEASUREMENT AND STANDARDS:

Chart will show the position and reporting relationship of each individual listed on the current Mail Distribution Roster. Job titles will reflect major duties. When checked by your Division Manager, no more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 2 hours

NOTES:

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REQUIRED ACTIVITY 4 - "Sales Organization."

ACTIVITY DESCRIPTION:

Draw an organization chart for Company X's sales organization. For all Division Sales Managers and above (including National Accounts, Automotive Sales, and Government Sales) show the name, job title, and major responsibilities of each individual.

RESOURCES:

Documents - Company X Organization Chart
Company X Sales Bulletins
Corporate Policy Memoranda

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Chart will show the position and reporting relationship of each individual listed on the current Mail Distribution Roster. Job titles will reflect major duties. When checked by your Division Sales Manager, no more than 5 errors of any type will be noted.

TIME PLAN:

<table>
<thead>
<tr>
<th>PROJECTED</th>
<th>ACTUAL</th>
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<tr>
<td>Beginning Date:</td>
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<td>Completion Date:</td>
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</table>

REFERENCE TIME: 2 hours

NOTES:

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SALES ORIENTATION AND TRAINING PROGRAM

REQUIRED ACTIVITY 5- "Types of Operating Authority."

ACTIVITY DESCRIPTION:

List the categories of common carrier operating authority and write a complete definition of each. For each category defined, give no less than one example.

RESOURCES:

Documents - Traffic Guide
Company X Routing Guide
Programmed Instruction Course in Truck Transportation, frames 87-97

People - Terminal Manager
Division Manager
Division Sales Manager
Traffic Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your definitions with your Terminal Manager. All definitions must be accurate and must include an example of each type of operating authority.

TIME PLAN:

<table>
<thead>
<tr>
<th></th>
<th>PROJECTED</th>
<th>ACTUAL</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
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<tr>
<td>Completion Date:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

REFERENCE TIME: 1 hour

NOTES:

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REQUIRED ACTIVITY 6 - "Company X's Operating Authority."

ACTIVITY DESCRIPTION:

For each of the states in which Company X holds operating authority (see #22 of Questionnaire A) list the type(s) of operating authority held in that state. Also list the terminal(s) serving each state listed.

RESOURCES:

Documents - Company X Routing Guide
Company X Sales Maps

People - Terminal Manager
Division Manager
Traffic Manager
Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 4 errors of any type will be noted.

TIME PLAN:

<table>
<thead>
<tr>
<th>PROJECTED</th>
<th>ACTUAL</th>
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<tr>
<td>Beginning Date:</td>
<td></td>
</tr>
<tr>
<td>Completion Date:</td>
<td></td>
</tr>
</tbody>
</table>

REFERENCE TIME: 2 hours

NOTES:
The activities in this section deal with the origin, growth, operations, and regulations of the truck transportation industry.
REQUIRED ACTIVITY 7 - "Origin and Growth of the Truck Transportation Industry."

ACTIVITY DESCRIPTION:

Answer Questionnaire B, "Origin and Growth of the Truck Transportation Industry." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Programmed Instruction Course in Truck Transportation, pages ii through vi

People - Division Sales Manager
       Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with the Training Administration Specialist. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 2 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 1 hour

NOTES:

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Questionnaire B, "Origin and Growth of the Truck Transportation Industry."

1. In 1905, how many private and for-hire trucks were registered in the United States? _______

2. After which major historical event did the trucking industry really come into its own? __________________________

3. What happened to the growth of the trucking industry during the years of the Great Depression?

   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

4. Why was the year 1935 a significant one for the trucking industry?

   __________________________________________________________
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5. During each of the following years, how many trucks (excluding Government-owned trucks) were registered in the United States?

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6. In 1975, what percentage of all private and commercial vehicles (including motorcycles) traveling the nation's roads were private and for-hire trucks? ________%

7. During what year did new truck sales begin to decline? _________

8. According to recent figures, how many trucking firms are currently in operation? _________
9. Describe the trend in the trucking industry's ton-mile freight traffic between the years 1940 and 1975.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

10. In approximately which year did the motor carriers' percentage of the gross revenue generated by all regulated freight carriers first exceed the percentage generated by any of the following: railroads, water carriers, pipelines, and air carriers? ________

11. In that year, what percentage of the gross revenue for all regulated freight carriers was accounted for by motor carriers? ________

12. What has happened to that percentage figure since 1965?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

13. Approximately what percentage of the gross annual revenue of the trucking industry is accounted for by the single largest company? ________
REQUIRED ACTIVITY  8 - "General Operations of the Truck Transportation Industry."

ACTIVITY DESCRIPTION:

Complete the final examination for the Programmed Instruction Course in Truck Transportation. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Programmed Instruction Course in Truck Transportation

People  - Terminal Manager
Division Manager
Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your answers with the Training Administration Specialist. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 10 hours

NOTES:
REQUIRED ACTIVITY 9 - "Regulation of the Motor Carrier Industry."

ACTIVITY DESCRIPTION:

Answer Questionnaire C, "Regulation of the Motor Carrier Industry." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 164-166
People - Terminal Manager
Division Manager
Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 2 hours

NOTES:
Questionnaire C, "Regulation of the Motor Carrier Industry."

1. When was the I.C.C. (Interstate Commerce Commission) created?

2. What industry was under its jurisdiction at that time?

3. What act provided for the creation of the I.C.C.?

4. In what year was the motor carrier industry brought under government economic regulation? __________

5. Why is Part II of the Interstate Commerce Act significant?

6. Into how many major divisions is the Interstate Commerce Commission divided? Briefly describe each.
7. What governmental agencies regulate the motor carrier industry in the area of safety? Elaborate.

8. Are all motor carriers regulated in the area of safety? Elaborate.

10. Define interstate commerce.

11. Define intrastate commerce.

12. Define foreign commerce.

13. Match the following by drawing lines to connect the regulatory bodies and the type(s) of commerce under the jurisdiction of each:

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<th>REGULATORY BODY</th>
<th>TYPE OF COMMERCE</th>
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<tr>
<td>I.C.C.</td>
<td>FOREIGN</td>
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<td>STATE GOVERNMENT</td>
<td>INTRASTATE</td>
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<td>INTERSTATE</td>
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REQUIRED ACTIVITY 10 - "Channels of Distribution."

ACTIVITY DESCRIPTION:

a. Define a channel of distribution.

b. Describe, in detail, the four major channels of distribution.

c. For each major channel of distribution, indicate which individual(s) control(s) the freight routing.

d. Describe the effects of terms of sale and F.O.B. terms on routing control for each of the four major distribution channels.

Use separate paper for your work.

RESOURCES:

People - Division Sales Manager
Terminal Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Review your work with your Division Sales Manager. If there is a dispute over the accuracy of your work, your responses will be considered correct if you can verify their accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED

Beginning Date: ___________________________

Completion Date: ___________________________

REFERENCE TIME: 1 hour

NOTES:
Terminal Operations

Activities 11 - 17

The activities in this section deal with the organization and general operations of a Company X terminal.
REQUIRED ACTIVITY 11 - "Terminal Organization."

ACTIVITY DESCRIPTION:

List the names and major responsibilities of each of the following individuals at your terminal:

- Terminal Manager
- Dock Supervisor
- P & D Supervisor
- Billing Clerk
- Cashier
- Dockworkers
- City Drivers
- Linehaul Drivers
- Office Manager, if applicable
- Operations Manager, if applicable

RESOURCES:

- Documents - Programmed Instruction Course in Truck Transportation
- People - Personnel Manager
  - Terminal Manager
  - Terminal Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your responses will be considered correct if you can justify them. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 2 hours

NOTES:
REQUIRED ACTIVITY 12 - "Terminal Equipment."

ACTIVITY DESCRIPTION:

Answer Questionnaire D, "Terminal Equipment." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Company X Master Equipment Listing
Company X Equipment Inventory Report

People - Terminal Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 2 hours

NOTES:
1. Regarding your terminal's city equipment, list the types of equipment and the number of each available.

   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________

2. List the types of special material handling equipment and the number of each available.

   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________

3. Does your terminal use rental equipment during peak periods? If yes, describe how it is obtained.

   _______________________________________
   _______________________________________
   _______________________________________
   _______________________________________
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4. Describe your terminal's weekend pickup and delivery activity.

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

5. Regarding over-the-road (linehaul) equipment, list the number of tractors and trailers currently available at your terminal.

____________________________________________________________________
REQUIRED ACTIVITY  13 - "O.S. & D. and Claims."

ACTIVITY DESCRIPTION:

Answer Questionnaire E, "O.S. & D. and Claims." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual

People - Terminal Manager
Division Sales Manager
Division Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED  

Beginning Date: __________________________
Completition Date: _______________________

REFERENCE TIME: 3 hours

NOTES:
1. What do the initials "O.S. and D." stand for?

2. Describe in detail the procedure for reporting freight overages.

3. Define the following types of freight overage.
   a. Dead Over.
   b. O.W.B.
4. Briefly define the following types of shortage.

a. Shortage at origin terminal.

b. Shortage at destination terminal.

c. All Short.

d. Partial Short.
5. Describe in detail the procedure for reporting freight shortages.

6. List the major causes of freight damage.

7. Describe in detail the procedure for inspecting and reporting damaged freight. Include procedures for damaged hazardous materials.
8. What is "free astray" or "wild" freight?

9. Describe in detail the procedure for handling free astray or wild freight.

10. Describe in detail the procedure for disposing of damaged freight.
REQUIRED ACTIVITY 14 - "Truck Mail."

ACTIVITY DESCRIPTION:

Answer Questionnaire F, "Truck Mail." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual

People - Terminal Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED

Beginning Date: ________________________________
Completion Date: ________________________________

ACTUAL

REFERENCE TIME: 1 hour

NOTES:
Questionnaire F, "Truck Mail."

1. What is truck mail?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. Describe in detail the procedure for sending materials by truck mail.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. Where can truck mail be sent?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
4. How often and when is truck mail dispatched from your terminal?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

5. How often and when does truck mail arrive at your terminal?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

6. How long does it take for truck mail leaving your terminal to arrive at the General Office?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

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REQUIRED ACTIVITY 15 - "Cartage, Interline, and Interchange."

ACTIVITY DESCRIPTION:

Answer Questionnaire G, "Cartage, Interline, and Interchange." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual

People - Terminal Manager
Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 2 hours

NOTES:
1. Define the following:
   a. Interline.

   b. Cartage Agent.

   c. Freight Interline - Advance Carrier.

   d. Freight Interline - Beyond Carrier.

   e. Equipment Interchange.

2. Briefly describe the procedure to be followed in handling freight for which Company X is a beyond carrier.
3. Briefly describe the procedure to be followed in handling freight for which Company X is an advance carrier.

4. Under what circumstances does Company X interchange equipment with other carriers?
5. Describe the procedure to be followed in interchanging equipment when:

   a. Company X accepts another carrier's trailer.

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

   b. Another carrier accepts a Company X trailer.

   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

6. Describe the procedure to be followed in handling tracing and/or P.O.D. (Proof Of Delivery) requests for interlined or interchanged shipments.

   ________________________________________________________________
   ________________________________________________________________
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   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

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REQUIRED ACTIVITY 16 - "Company X Account Coding."

ACTIVITY DESCRIPTION:

Answer Questionnaire H, "Company X Account Coding." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Company X Sales Bulletins

People - Terminal Manager
Division Sales Manager
Sales Representatives
General Office Sales Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type should be noted.

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REFERENCE TIME: 2 hours

NOTES:
1. What are the advantages of inbound and outbound account coding?

2. What is the minimum revenue-per-period an account must produce before it can be coded?

3. Where are requests for account coding sent? Include the name(s) and number(s) of any form(s) used.

4. When and how often will requests for new code numbers and/or changes or deletions in existing account codes be accepted?
5. What exceptions will be made to the acceptance times?

6. Describe in detail the procedure to be followed in requesting that an account be assigned a code.
REQUIRED ACTIVITY 17 - "Granting Customer Credit."

ACTIVITY DESCRIPTION:

Answer Questionnaire I, "Granting Customer Credit." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual

People - Director of Revenue Accounting
            Terminal Manager
            Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 4 hours

NOTES:
1. What limits, if any, are set regarding the extension of credit to
   Company X customers? Include limits on time and dollar amounts.

2. Describe in detail the procedure to be followed in arranging for the
   extension of credit to a Company X customer.

3. Who must approve the extension of credit?
4. Describe the legal regulations concerning the collection of overdue accounts.

5. Describe in detail the procedure to be followed in collecting overdue accounts.
Shipping Papers and Procedures  Activities 18 - 20

The activities in this section have been designed to acquaint you with a few of the Company X shipping papers and the procedures to be followed in handling them.
REQUIRED ACTIVITY 18 - "Bills of Lading."

ACTIVITY DESCRIPTION:

Complete the skill quiz at the end of the programmed instruction course entitled, "Interpreting Bills of Lading."

RESOURCES:

Documents - Programmed Instruction Course "Interpreting Bills of Lading"

People - Terminal Manager
Division Sales Manager
Sales Representatives
Billing Clerk

MEASUREMENT AND STANDARDS:

Check your answers with the Training Administration Specialist.
Correct all erroneous responses.

TIME PLAN:

PROJECTED

Beginning Date: ________________________
Completion Date: _____________________

ACTUAL

REFERENCE TIME: 1 hour

NOTES: Though the bills of lading used by Company X may differ slightly from the examples provided in "Interpreting Bills of Lading," you will be learning the basics common to all forms of this document.
REQUIRED ACTIVITY 19 - "Delivery Receipts."

ACTIVITY DESCRIPTION:

Describe the procedure for processing and filing delivery receipts for:
a) prepaid bills, b) collect bills - C.O.D., order notify, and c) collect bills - delivery on open accounts. Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

Use separate paper for your work.

RESOURCES:

Documents - Standard Procedures Manual
Corporate Policy Memoranda

People - Terminal Manager
Division Sales Manager
Division Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ____________________________ ____________________________
Completion Date: ____________________________ ____________________________

REFERENCE TIME: 2 hours

NOTES:
REQUIRED ACTIVITY 20 - "F.O.B. Terms."

ACTIVITY DESCRIPTION:


Use separate paper for your work.

RESOURCES:

Documents - Standard Procedures Manual
Corporate Policy Memoranda

People - Division Sales Manager
Terminal Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your work with your Division Sales Manager. If there is a dispute over the accuracy of your work, your responses will be considered correct if you can verify their accuracy. No more than 3 errors of any type will be noted.

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REFERENCE TIME: 1 hour

NOTES:
SECTION 5

Tariffs

The activities in this section deal with tariffs and rates, as well as the procedures and documents necessary for a Company X Sales Representative to request a tariff change for a customer.
REQUIRED ACTIVITY  21 - "Tariffs."

ACTIVITY DESCRIPTION:

Answer Questionnaire J, "Tariffs." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Traffic Guide

People - Terminal Manager
    Division Manager
    Division Sales Manager
    Traffic Manager
    Terminal Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED     ACTUAL

Beginning Date: ________________________     ________________________

Completion Date: ________________________     ________________________

REFERENCE TIME: 2 hours

NOTES:
1. What is a tariff?

2. Name and define two broad types of tariffs.

3. Approximately how many different classes of tariffs exist?  

4. What is a rate?
5. List and briefly define the three categories into which all rates generally fall.

7. Briefly describe the procedure by which a tariff is established. Include individuals and agencies involved.


8. How does Company X request a tariff change?
REQUIRED ACTIVITY 22 - "Requesting Tariff Changes."

ACTIVITY DESCRIPTION:

Describe the procedure that you, as a Sales Representative, should follow in requesting a tariff change. Include any forms which must be completed and personal contacts which must be made.

RESOURCES:

Documents - Standard Procedures Manual

People - Terminal Manager
Division Manager
Division Sales Manager
Traffic Manager
Terminal Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 1 hour

NOTES:
REQUIRED ACTIVITY 23 - "Tariff Change Documents."

ACTIVITY DESCRIPTION:

Using the information provided on the following pages, complete an actual Company X Request for Tariff Change form.

RESOURCES:

Documents - Standard Procedures Manual

People - Terminal Manager
Division Manager
Division Sales Manager
Traffic Manager
Terminal Personnel

MEASUREMENT AND STANDARDS:

Check your completed form with your Division Sales Manager. If there is a dispute over the accuracy of your work, your responses will be considered correct if you can verify their accuracy. No more than 2 errors of any type will be noted.

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REFERENCE TIME: 1 hour

NOTES:

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You are calling on Sam Jessup, Director of Distribution for Broaster Company, which recently moved to 33540 James Park in Beloit, Wisconsin.

In the past, Sam has been specifying Company X to handle a pretty fair portion of Broaster's freight and is pleased with the service. As the conversation progresses, you learn that in about a month Broaster will be placing a new order for two trailer loads of flour per month from Con Agra of 114 Hamilton Drive in Omaha, Nebraska. Sam would like to use Company X to handle this new move, but thinks the present rate he would have to pay ($1.91 per hundredweight with a minimum weight of 24,000 pounds) is too high. He, therefore, proposes that you attempt to obtain a new, lower rate and suggests that $1.16 per hundredweight with a minimum of 40,000 pounds would be more favorable. A rate and a minimum weight for shipping by rail does exist, but is currently unknown. In any event, Sam must use a motor carrier for this shipment because Broaster does not have a rail siding at its new location.

Sam has worked out most of the details with Con Agra. Con Agra will load the average shipment of 44,000 pounds of flour which is to be packaged in bags on 16 skids (skids to be returned to them) into a city trailer to be spotted at their dock. No overflow is to be permitted. This weight is ideal because that is the most which can be allowed on a Company X 40-foot trailer. Because Broaster will need a shipment of this type roughly every other week, this could represent an additional 88,000 pounds for Company X each month. When the shipments arrive in Beloit, Wisconsin, Broaster will unload the flour and pay the shipping charges. Sam wants to know within a month whether or not the new rate will be honored.
Just before you leave Sam's office, Same saves you some work by informing you that the National Motor Freight Classification item number for the flour is 73140 and it is classed as 50/35. You already know that the Tariff Authority for the area is Middlewest and the MF-ICC number is 501. Upon returning to the terminal, you look up the number of Company X miles for the proposed move and find it to be 457.
SECTION 6

Sales Forms

The activities in this section will acquaint you with those Company X forms which are sales-related and will teach you how to fill out some important and/or commonly used forms.
REQUIRED ACTIVITY 24 - "Sales Form Identification."

ACTIVITY DESCRIPTION:

Using the attached worksheet, list the name, form number, and frequency of use of each form used by Company X Sales Representatives.

For those which are not regularly used (those which are used as required) indicate what requirement triggers the use of each.

RESOURCES:

Documents - Standard Procedures Manual
Company X Sales Bulletins
Corporate Policy Memoranda

People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your worksheet with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

BEGINNING DATE: _____________________________

COMPLETION DATE: _____________________________

REFERENCE TIME: 4 hours

NOTES:
### Sales Form Identification Worksheet

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**Comments**

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REQUIRED ACTIVITY 25 - "Traffic Leads."

ACTIVITY DESCRIPTION:

Answer Questionnaire K, "Traffic Leads." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual
Company X Sales Bulletins
Corporate Policy Memoranda

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

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REFERENCE TIME: 1 hour

NOTES:
1. What is a Traffic (Sales) Lead and how and why is it generated?

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2. How many copies comprise the Traffic Lead? ______

3. For the various types of accounts, describe what is to be done with each copy of the Traffic Lead form.

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4. In general, what are the requirements for issuing and responding to Traffic Leads?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
REQUIRED ACTIVITY 26 - "Sales Form Use."

ACTIVITY DESCRIPTION:

Using the information provided on the following pages, complete the following sales forms:


b. Traffic Lead.

c. Follow-Up on Traffic Lead.

RESOURCES:

Documents - Standard Procedures Manual

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your completed forms with your Division Sales Manager. If there is a dispute over the accuracy of your responses, your answers will be considered correct if you can verify their accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

| Beginning Date: | ______________________ | ______________________ |
| Completion Date: | ______________________ | ______________________ |

REFERENCE TIME: 2 hours

NOTES: The Company X names for these forms may differ somewhat from those listed under "Activity Description" above. Check with your local Sales Representatives.
Your first scheduled stop of the day is at Shaker Tool and Die, an account which ships out about 3,500 pounds of specialty parts each week to one of its customers in a nearby city. Shaker has increased its volume somewhat over the past eight months, but still accounts for only about $800 in revenue each period. You have not made an appointment to see the Traffic Manager, Bob Crouch, because you know him very well and are certain that he will be in this morning. Your main objective in visiting Shaker is to determine how well Bob feels Company X has been serving Shaker and to see if you can persuade him to turn over all of his traffic to you. Upon talking to the receptionist, you learn that Bob is out of town for the week. You would like to see him as soon as he returns and, therefore, make a mental note of this fact before you leave the lobby.

After a brief drive, you arrive at your next scheduled stop. You have an appointment with Bernie Howard of Lawler and Brooks, a company which ships out roughly half of its freight with Company X and the rest with a competing carrier. The freight Company X handles for Lawler and Brooks is very profitable but never totals more than 9,000 pounds in a single shipment, so there is plenty of room on a trailer for more freight. You would like to find out specifically why Bernie gives part of Lawler's freight to your competition and perhaps persuade him that shipping with Company X would be an advantage for him.

After greeting Mr. Howard, you get down to nuts and bolts to discover that he didn't hear of a change in routing recently given to Company X for moves of his nature. You demonstrate to him that you can save him at least a day in delivery time over the other carrier, perhaps occasionally even more. He is impressed with this news, as most of his freight needs to be
delivered rapidly. In addition, you have shown Bernie how he can consolidate some of his freight to save money. Bernie agrees that Company X will be given another 18,000 pounds per week, but prefers to give the remaining 2,000 pounds or so to the competition to avoid having to interline it.

The next stop you make is with Jonathan Graphics, a very small producer of professional graphics materials which currently uses Company X as the carrier for its finished goods, but utilizes two other carriers for its supplies. You have made plans to see the General Manager, Jim Hart, who is expecting you this morning.

This is an account which is relatively new to Company X; Jim had said two months ago that he was willing to give Company X a try because he had had poor service from the previous carrier of the finished goods. All of his freight, inbound or outbound, is L.T.L. freight. Your goal, as with Lawler and Brooks, is to determine why Company X is not carrying more of their freight, and to see if you can be of more service.

Jim is pleased to see you are on time and seems to be delighted with Company X's prompt and safe delivery over the past eight weeks. The two of you begin to discuss other movements, and agree that Company X could replace one of the two carriers now bringing in Jonathan Graphics' supplies. You are able to convince Mr. Hart to sign a routing order, requesting one of his suppliers to specify Company X as one of his inbound carriers. Immediately following this, Jim mentions that he believes that the rate applied to his current shipments is a bit too high and asks you to see if it can be lowered.

You write down that information on a Request for Tariff Change form you have in your briefcase and thank Jim for the opportunity to stop by.
A few blocks from Jonathan Graphics you remember that it has been quite a while since you've stopped at Wholesale Lumber. You seem to be ahead of your schedule and things seem to be right for dropping in to see Chuck Klocko, the Director of Distribution. On your way in you recall that Wholesale Lumber brings Company X a medium amount of revenue by shipping 30-40,000 pounds of lumber both in and out of its facility.

Chuck, not expecting to see you today, is visibly upset with your presence and says he is glad you are here because there is something he would like to discuss with you. It seems that over the past three or four weeks Wholesale Lumber has been deluged by Sales Representatives from competing carriers, claiming their carriers will provide superior service. Chuck said that just yesterday he agreed with a Sales Representative from another carrier to have that carrier handle roughly three-quarters of his inbound freight. When you hear some of the claims made to Chuck by the other Sales Representatives, they sound inflated and you are sure that they won't be met. Nevertheless, Chuck has given a sizeable portion of your business to someone else and the chances of getting it back today seem nil. You apologize to Chuck for not having seen him sooner and thank him for maintaining the outbound, and part of the inbound business with Company X. After telling him that you will call next week to set up an appointment to go into this matter in detail, you head for your next stop before lunch.

The next stop is at Porter Production, Inc., where you have an appointment to see Kyle Austin, the Materials Manager. Porter is an account of medium revenue for which Company X has been the carrier of its full truck-loads of supplies for several years. You are fairly certain that Company X is still providing admirable service, but you have scheduled the stop
because six weeks have passed since your last visit. When you tell the receptionist you have an appointment, she informs you that Kyle had to leave earlier in the morning because his wife had been involved in a minor car accident. Upon hearing this, you write a note to Kyle in which you say your thoughts are with him and his wife and say you will check back with him when it is convenient for him. You leave this note with the receptionist to give to Kyle when he returns and then leave, making a note that you must get back to him.

You have scheduled a luncheon appointment with Jack Olson, the Traffic Manager of Airco, a very large manufacturer of an extensive line of compressed gases. Currently, Airco does no business with Company X and you know that Company X serves the same general areas as the other carriers which now serve Airco. You and Jack have met on two other occasions, but you believe that on both occasions Jack had too many other important things which occupied his mind. Lunch today should give you more time to get to Jack and Airco's special needs. After lunch, you decide that Airco is very satisfied with their present carriers and Jack cannot see advantages to using Company X to ship their partial truckloads into their facility and their full truckloads out. You haven't gained much ground with this appointment, but you haven't lost any either.

Your first stop after lunch is at Cohen & Sons, a small manufacturer of electrical insulators. Another carrier brings their small shipments to them, and for this you figure the competition must get roughly $700 per period. You are familiar with the competing carrier Cohen & Sons now uses and know that its service is mediocre, at best. James Sullivan is your contact and has the duties of Materials Manager.

You and Mr. Sullivan have previously discussed the use of Company X
and he seemed very interested as his freight claims with the other carrier are high, due to the fact that his product is fragile. In fact, Mr. Sullivan called your terminal two days ago and asked that a Sales Representative be sent out as soon as possible. The call is brief, and Jim agrees to turn over all of his traffic to you.

After a drive across town, you make your next visit at Bimetallic where you plan to see the shipping clerk, John Shaffer. Bimetallic is currently using Company X and two carriers to ship its partial and full truckloads both into and out of its plant. It is one of the largest accounts in the area. John had mentioned some time ago that he has been more than satisfied with Company X's service and is considering using us to handle a new inbound move. Before leaving, you have secured a letterhead routing order from Bimetallic to the new supplier, specifying that they use Company X as the carrier. The new move will bring you about $1,100 of additional revenue each period.

You are now well ahead of schedule and decide to make an unscheduled stop at Experi-Mental, a nearby assembler of test instruments. You don't know who to see and suspect that the freight volume is very low. Upon introducing yourself to the secretary, you are told that the purchasing agent is Ed Schmidt who does have a few minutes to speak with you. It becomes immediately obvious that this is the first visit by a Company X Sales Representative and that your assumption about Experi-Mental's very low freight volume (all inbound) was correct. Because Ed seems rushed and was not expecting you, you leave your business card and head to Conley Iron Works.

Conley Iron Works is headed up by Charles Pilot who presently specifies Company X to ship out loads ranging from 30,000 to 40,000 pounds. They are a relatively small account, nonetheless.
You have scheduled the call but have not made an appointment. Upon arriving, you find that the plant is on strike and you are unable to enter.

Again, you find yourself quite a bit ahead of schedule with only two more scheduled stops to make. Because it is important that you are on time for the last appointments, you decide against making any unscheduled visits.

As your follow-up on a sales lead sent to you by another terminal's Sales Representative, you make your first call on Riley's where you are to see the General Manager, Dan Riley. The other Sales Representative has already told you that Riley's consistently ships partial truckloads in and out of its facility and should amount to at least an average amount of revenue. The receptionist at Riley's informs you that Dan had to be out of the plant but did leave a request for you to return next Thursday at 3:00 p.m., if acceptable.

The last appointment of the day is with your only automotive account, General Motors, which presently does a tremendous business with Company X in all load sizes, both inbound and outbound. You have planned to have dinner with Frank Scott, the Director of Distribution. The call is one which you make every four weeks and, though your primary concern is to see if you can obtain more business, the calls usually seem more social than business. Frank tells you that he is satisfied with Company X's service, but doesn't have any additional traffic for you at the present.
Based on information received from Gary Peterson of Inking Specialists in Indianapolis, you are preparing a Traffic Lead for Lee Alan, a Company X Sales Representative based in Port Huron, Michigan. The lead pertains to truckload shipments of paper margarine containers made by Cardcon Paper in Zionsville, Indiana which are shipped to Southeast Michigan Dairy in Marysville, Michigan. Currently the move is being handled by Company Z Freight, which seldom delivers in less than six days, creating some problems for Pete Hackman, the Materials Manager at Southeast Michigan Dairy. The shipments seem to move monthly, but Southeast Michigan Dairy would be served better if their orders arrived in 20,000 pound shipments every other week.

You call upon Bill Norris, shipping clerk for Cardcon Paper, who quickly informs you that Pete Hackman of Southeast Michigan Dairy is in charge of the routing but that, for some reason, he thinks that Company X may have some difficulty in convincing Pete to use Company X.

After you send your lead to Lee, you wait two weeks but do not hear from him.
SECTION 7

Sales Quotas

The activities in this section deal with Company X sales quotas: how the various quotas are reviewed and set by each level of the sales organization and the ways in which a Sales Representative can evaluate his performance in relationship to these quotas.
REQUIRED ACTIVITY 27 - "Company X Sales Quotas."

ACTIVITY DESCRIPTION:

Answer Questionnaire L, "Company X Sales Quotas." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual
Company X Sales Bulletins

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

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REFERENCE TIME: 3 hours

NOTES:

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1. What categories of types of Company X sales quotas are established? (For example, L.T.L. revenue, Truckload weight, etc.)

2. How often are sales quotas reviewed and/or established?

3. Describe in detail the process by which sales quotas are established at Company X. Include the titles of individuals involved and their specific roles in the process.
4. At what stage of the quota-setting process are field meetings held?


5. What is the Sales Representative's role in the quota-setting process? Explain fully.


6. What is the general relationship between sales quotas and the Company X incentive program?


7. Who is eligible to participate in the incentive program?


8. What levels of quota accomplishment must a Sales Representative achieve before qualifying for incentive payments?


9. How often are incentive payments calculated and paid?


10. How much incentive income can a Company X Sales Representative earn annually?


11. What is meant by "system balance"?
12. What general category of quotas has been developed to help minimize system imbalances?

13. Briefly describe how a Company X Sales Representative can use these quotas to promote system balance.
REQUIRED ACTIVITY  28 - "Identification of Terminal Sales Quotas."

ACTIVITY DESCRIPTION:

Complete the exercise on the following page. Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Standard Procedures Manual
            Company X Terminal Budget

People - Division Sales Manager
          Sales Representatives
          Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 2 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ________________________  ________________________
Completion Date: ________________________  ________________________

REFERENCE TIME: 1 hour

NOTES:
Identification of Terminal Sales Quotas

In the spaces provided below, list the type and amount of each current sales quota established for your terminal.

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<thead>
<tr>
<th>Sales Quota</th>
<th>Current Quota Amount ($ or wt.)</th>
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Time and Territory Management Activities 29-38

The following activities deal with ways in which a Company X Sales Representative can maximize the productive use of available time.
REQUIRED ACTIVITY  29 - "Time and Territory Management."

ACTIVITY DESCRIPTION:

Answer Questionnaire M, "Time and Territory Management." Note the reference source next to each response.

RESOURCES:

Documents - Selling Motor Carrier Service, pages 147-149
  Company X Sales Bulletins

People    - Division Sales Manager
  Sales Representatives
  Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED                                ACTUAL

  Beginning Date: ________________________________
  Completion Date: ______________________________

REFERENCE TIME: 2 hours

NOTES:
1. Recent studies show that motor carrier Sales Representatives spend approximately what fraction of their time in face-to-face contact with customers?

2. As a Sales Representative, why is it important to know just how your time is being spent now?

3. List at least fifteen steps which a motor carrier Sales Representative can take to improve the use of his time.
4. What form(s) can be used by Company X Sales Representatives in planning their sales activities on a regular basis?

5. Many Sales Representatives use luncheon meetings to improve the use of their time. Describe in detail the guidelines placed on such expenditures by the corporate travel and entertainment policy.
REQUIRED ACTIVITY  30 - "Telephone Sales."

ACTIVITY DESCRIPTION:

Using the copy of the "Telephone Sales Schedule" provided on the following page and the "Telephone Sales Instructions" provided on the subsequent page, answer Questionnaire N, "Telephone Sales." Note the reference source next to each response.

RESOURCES:

Documents - Sample Telephone Sales Schedule form
Sample Telephone Sales Instructions

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 1 error of any type will be noted.

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REFERENCE TIME: ½ hour

NOTES:
## COMPANY X

### TELEPHONE SALES SCHEDULE

<table>
<thead>
<tr>
<th>COMPANY NAME</th>
<th>WEEK ONE</th>
<th>WEEK TWO</th>
<th>WEEK THREE</th>
<th>WEEK FOUR</th>
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**NAME**

**PERIOD**
Telephone Sales is a system designed to increase a Sales Representative's exposure to his contacts.

1. Identify the large active and potential accounts in your territory. These accounts should be those which you visit in person every four weeks or so.

2. Schedule Telephone Sales calls for these accounts in this manner:

<table>
<thead>
<tr>
<th>WEEK OF EACH PERIOD</th>
<th>WEEK OF PERIOD TELEPHONE SALES CALL TO BE MADE</th>
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<tr>
<td>IN-PERSON CALL MADE</td>
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<td>3</td>
<td>1 (NEXT PERIOD)</td>
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<td>2 (NEXT PERIOD)</td>
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3. When using the Telephone Sales system, ask for specific business. To achieve this objective, you may wish to set up lunches, dinners, or other meetings. When the call is made, place a check in the appropriate box to indicate when the call was made.

4. Review this sheet weekly with your Terminal Manager. When the form is complete, file it with your Weekly Working Plan forms.

5. Your goal should be 5 Telephone Sales calls each day or 25 per week.
1. What is the objective of the Telephone Sales system?

2. Generally, which accounts should be targets of Telephone Sales?

3. What should be the objectives to any given Telephone Sales call?

4. How are Telephone Sales calls to be scheduled?
5. What notation is to be made on the Telephone Sales Schedule when a telephone call is made?

6. What is to be done with the Telephone Sales Schedule at the end of each week? After completion?
REQUIRED ACTIVITY 31 - "Telephone Sales Projections."

ACTIVITY DESCRIPTION:

Spend three days with a Sales Representative at your training terminal. Using the sample Telephone Sales Schedule provided, record your projections regarding when and to which accounts Telephone Sales calls should be made.

RESOURCES:

Documents - Sample Telephone Sales Schedule form
Sample Telephone Sales Instructions

MEASUREMENT AND STANDARDS:

Check the Telephone Sales Schedule at the end of the three-day period with the Sales Representative with whom you rode. The form should, in that Sales Representative's estimation, accurately identify when and to which accounts Telephone Sales calls should be made.

TIME PLAN:

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REFERENCE TIME: 30 hours (3 10-hour days)

NOTES:
REQUIRED ACTIVITY 32 - "Activity Log."

ACTIVITY DESCRIPTION:

Spend three days with a Sales Representative at your training terminal. Using photocopies of the Daily Activity Log provided in the Administrative Forms section at the back of this program, record the manner in which the Sales Representative spends his time. At the end of each day, summarize:

1. Pre-call planning
2. Telephone usage
3. Travel time
4. Waiting time
5. Face-to-face selling
6. Tracing shipments
7. Expediting shipments
8. Office paperwork, and clerical tasks
9. Meals
10. Other (explain)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 147-149

People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check each Daily Activity Log and summary with the Sales Representative with whom you rode. Each log should accurately reflect the manner in which that Sales Representative spent each day. The total time reflected in the logs should equal the total time expended in the three-day period.

TIME PLAN:

PROJECTED

ACTUAL

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 30 hours (3 10-hour days)

NOTES:
REQUIRED ACTIVITY 33 - "Activity Log Evaluation."

ACTIVITY DESCRIPTION:

Evaluate the Sales Representative's use of time from the previous activity in terms of the time and territory management principles covered in the resource identified below. Identify techniques which the Sales Representative used to maximize productive use of his time. Also identify non-productive uses of time. Make specific suggestions as to how the time could have been more productively spent.

RESOURCES:

Documents - Selling Motor Carrier Service, pages 147-149
People   - Division Sales Manager

MEASUREMENT AND STANDARDS:

Check your evaluation with the Training Administration Specialist. If there is a dispute over your procedure or suggestions, yours will be considered correct if you can justify them. Note any changes the Training Administration Specialist suggests.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 3 hours

NOTES: Because of the potentially sensitive nature of this activity, do not discuss it with anyone except the Training Administration Specialist. Your comments will be held in strict confidence.
REQUIRED ACTIVITY 34 - "Determining Appointment Desirability."

ACTIVITY DESCRIPTION:

Answer Questionnaire O, "Determining Appointment Desirability." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 45-46
People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 1 hour

NOTES:
Questionnaire Q, "Determining Appointment Desirability."

1. What are two advantages of making an appointment for a sales call?

__________________________________________________________

__________________________________________________________

2. What are two disadvantages of making an appointment for a sales call?

__________________________________________________________

__________________________________________________________

3. A newly appointed president of a firm has just been announced in the press. He comes from a distant city and you have never met him but wish to call to get acquainted, as his firm ships large quantities occasionally with you and you hope to increase their volume with Company X. Would you seek an appointment? Why or why not?

__________________________________________________________

__________________________________________________________

__________________________________________________________

4. You wish to drop by to get a signature on some claim papers from a shipping room supervisor you know well and who is friendly to you. Should you make an appointment? Why or why not?

__________________________________________________________

__________________________________________________________

__________________________________________________________
5. Assume you know the General Traffic Manager of Company A fairly well. Company A ships with a competitor, but occasionally you get some crumbs. You hope to see him to tell him about an improved service to west coast points. Is an appointment indicated? Why or why not?

[Blank lines]

[Blank lines]
REQUIRED ACTIVITY 35 - "Sequencing Sales Calls."

ACTIVITY DESCRIPTION:

Answer the following questions. Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.) Use separate paper for your work.

1. What is meant by call sequence?
2. Why should call sequence be carefully considered?
3. What are five main considerations for developing a good routing schedule?

RESOURCES:

Documents - Selling Motor Carrier Service, pages 144-146
People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

| Beginning Date: | __________________________ | __________________________ |
| Completion Date: | __________________________ | __________________________ |

REFERENCE TIME: 1 hour

NOTES:
REQUIRED ACTIVITY  36 - "Sequencing Sample Sales Calls."

ACTIVITY DESCRIPTION:

Complete the exercise on the following page.

RESOURCES:

Documents - Selling Motor Carrier Service, pages 144-146

People - Division Sales Manager
          Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 3 errors of any type will be noted.

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REFERENCE TIME: 2 hours

NOTES:
A Sales Representative has 26 planned calls for a particular week. They are scattered throughout his city territory according to this diagram:

In the spaces provided below, indicate which calls should be scheduled each day to secure an efficient routing.

Monday ____________________________ Tuesday ____________________________

Wednesday ____________________________ Thursday ___________________________

Friday ____________________________
REQUIRED ACTIVITY  37 - "Sales Territory."

ACTIVITY DESCRIPTION:

Answer Questionnaire P, "Sales Territory." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Map of Sales Territory

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 3 errors of any type will be noted.

TIME PLAN: PROJECTED ACTUAL

| Beginning Date: | ___________________________ | ___________________________ |
| Completion Date: | ___________________________ | ___________________________ |

REFERENCE TIME: 5 hours

NOTES:
1. Into how many territories is the market area surrounding your training terminal divided?

________________________________________________________________________

________________________________________________________________________

2. What are the major boundaries of each territory?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. For each of the sales territories within your training terminal's market area, list the following:

   a. Approximate number of square miles.

       __________________________________________

       __________________________________________

       __________________________________________

       __________________________________________

   b. Major accounts.

       __________________________________________

       __________________________________________

       __________________________________________

       __________________________________________
c. Major industrial centers or parks.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

 d. Inbound and outbound revenue.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

 e. Major manufacturers.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

 f. Sales Representative responsible for each area.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

 g. Major products.
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
REQUIRED ACTIVITY  38 - "Sales Territory Division."

ACTIVITY DESCRIPTION:

Answer Questionnaire Q, "Sales Territory Division." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Corporate Policy Memoranda
Company X Sales Bulletins

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED

Beginning Date: ____________________________

Completion Date: ____________________________

REFERENCE TIME: 2 hours

NOTES:

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Questionnaire 2, "Sales Territory Division."

1. Into how many parts should a newly-assigned Company X Sales Representative divide his territory? Why?

____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________

2. What data can be used to assist a newly-assigned Company X Sales Representative in organizing his territory? How can it be used?

____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________
____________________________________________________________________________________________________________________

3. Which accounts should a Company X Sales Representative call upon soon after his assignment to a territory? Why?

____________________________________________________________________________________________________________________
4. Within what amount of time following his assignment to a territory should a newly-assigned Sales Representative expect to have called upon all existing accounts? Why?

5. During the first four weeks immediately following a Sales Representative's assignment to a territory, should he call upon any potential accounts? Explain.
6. Describe in detail the procedure a new Sales Representative should follow in planning his sales calls for the first four weeks immediately following his assignment to a territory.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
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________________________________________________________________________
________________________________________________________________________
SECTION 9

Selling Skills

Activities 39 - 49

The following activities deal with the techniques a Company X Sales Representative can use to develop and deliver an effective presentation.
REQUIRED ACTIVITY 39 - "Knowledge of the Customer."

ACTIVITY DESCRIPTION:

Answer Questionnaire R, "Knowledge of the Customer." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 39-40
People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 2 hours

NOTES:

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Questionnaire R, "Knowledge of the Customer."

1. List at least fifteen questions which a good Sales Representative will want to have answered regarding the background of a given account and its contact(s).

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

2. How important is knowledge of the customer and his situation in relation to knowledge of Company X's service features? Why?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
3. When calling on an account, should a Sales Representative be satisfied with speaking to only one individual? Why or why not?

4. List at least ten job titles of individuals who may have control over some or all of a company's freight.

5. Should a Sales Representative attempt to meet all of these individuals during a single sales call? Explain.

6. Should a Sales Representative introduce himself to the above individuals? Explain.
SALES ORIENTATION AND TRAINING PROGRAM

REQUIRED ACTIVITY 40 - "Knowledge of a Selected Active Customer."

ACTIVITY DESCRIPTION:

Request from your Terminal Manager the name of an active account in your terminal's sales territory. Answer Questionnaire S, "Knowledge of a Selected Active Customer." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 39-40
Company X Sales Bulletins
Corporate Policy Memoranda

People - Terminal Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 4 hours

NOTES:
1. What is the exact name of the account?

2. What do they produce?

3. Who buys their goods?

4. Where are their goods shipped?

5. By what methods of transportation do they ship their goods?
6. What is the value per pound of the product(s) they ship?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

7. How do they pack their product(s) for shipment?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

8. What type of materials do they require for their operation?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

9. From what source(s) do they receive their materials?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

10. By what method(s) of transportation do they receive their goods?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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11. How is their inbound packed?

12. How often do they receive shipments?

13. Who determines their selection of carrier mode(s)?

14. Who determines their selection of carrier(s)?

15. What is the correct spelling of the names of key management individuals?
16. What are their titles?


17. Does the account have other plants? If so, where?


18. What is the account's annual sales volume (in dollars)?


19. What is the profitability of the firm?


20. What are some personal details of key individuals, i.e., spouse's name, other family, birthday, hobbies, etc.? 


21. For the most recent month, how much revenue did the account produce for Company X?

22. For the year-to-date, how much revenue did the account produce for Company X?

23. For the most recent month, how much freight volume (weight) did the account produce for Company X?

24. For the year-to-date, how much TL freight volume (weight) did the account produce for Company X?
REQUIRED ACTIVITY 41 - "Knowledge of a Selected Potential Customer."

ACTIVITY DESCRIPTION:

Request from your Terminal Manager the name of a potential account in your terminal's sales territory. Answer Questionnaire T, "Knowledge of a Selected Potential Customer." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 39-40

People - Division Sales Manager
          Terminal Manager
          Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED

Beginning Date: ____________________________

Completion Date: ____________________________

ACTUAL

 REFERENCE TIME: 4 hours

NOTES: You may also find research at the local library helpful in completing this activity.
1. What is the exact name of the firm?

_____________________________________________________________________________________

2. What do they produce?

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

3. Who buys their goods?

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

4. Where are their goods sold?

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

5. Which mode(s) of shipping do they use currently?

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

_____________________________________________________________________________________

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6. Which carrier(s) do they use now?


7. What is value per pound of the product(s) they ship?


8. How do they pack their goods for shipment?


9. What types of materials do they require for their operation?


10. From what source(s) do they receive their materials?


11. By what method(s) of transportation do they receive their inbound?  


12. How is their inbound packed? 


13. How often do they ship or receive their goods? 


14. What is their approximate annual sales volume? 


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REQUIRED ACTIVITY 42 - "Setting Call Objectives."

ACTIVITY DESCRIPTION:

Answer Questionnaire U, "Setting Call Objectives." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 47-54

People - Terminal Manager
Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 1 hour

NOTES:

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1. List two types of objectives that should be set in planning for each sales call.

2. On every sales call the revenue goal should be the ______________ objective.

3. Should the specific nature of the ultimate objective be established in advance? Explain.

4. How attainable should be the minimum objective for each call?

5. Should a Sales Representative expect to achieve the ultimate, or revenue-oriented, goal on each sales call? Why or why not?
6. If a Sales Representative achieves the ultimate objective _____% of the time, he probably will be doing well.

7. How often should a Sales Representative expect to achieve the minimum, or alternate, objective? Why?
REQUIRED ACTIVITY 43 - "Opening the Sales Call."

ACTIVITY DESCRIPTION:

Answer Questionnaire V, "Opening the Sales Call." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 62-73

People - Division Sales Manager
Sales Representatives
Terminal Manager

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

Beginning Date: ____________________________
Completion Date: ____________________________

REFERENCE TIME: 2 hours

NOTES:
1. What is the purpose of the opening statements of a sales call?

2. Before a Sales Representative can get the client talking, what must he have accomplished?

3. Why may a Sales Representative have difficulty capturing a client's attention?

4. Is there a formula which a Sales Representative can use to always "get through" to a customer even under the above circumstances? Explain.
5. What simple technique of "getting through" to a customer has a good prospect of working most of the time even under adverse conditions, and upon what fundamental characteristic of people is this based?

6. Should all opening statements be "YOU" oriented? Explain.

7. Here are examples of call openings. Check the ones you feel are likely to gain the attention of the client. Explain your choices below.

   a. "Mr. Hart, I'm here this morning because I wanted to visit a few minutes about an additional service we are now able to offer you . . . etc."

   b. "Mr. Burke, I think that we at Company X will be able to upgrade your transit time on eastbound truckloads and I'd like to spend a few minutes talking about this . . . etc."

   c. "Mr. Thompson, as Developmental Service's Director of Distribution, you're undoubtedly very concerned with transportation and its relationship to customer service . . . etc."

   d. "Mr. Stewart, your name was given to me as the person who is most responsible at Chicago Manpower Development for obtaining supplies on a regular, prompt basis. You will be interested in knowing that . . . etc."
REQUIRED ACTIVITY 44 - "Features, Advantages, and Benefits of Service."

ACTIVITY DESCRIPTION:

Answer Questionnaire W, "Features, Advantages, and Benefits of Service." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 80-87
People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 2 errors of any type will be noted.

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REFERENCE TIME: 1 hour

NOTES:
1. Match the following words by drawing a line from each word in the column at the left to the appropriate word(s) in the column at the right.

| ADVANTAGES | PERSONAL |
| FACTUAL CHARACTERISTICS |
| ECONOMICS |

2. Identify the items in the list below as features, advantages, or benefits by placing an "F," "A," or "B" next to each.

- COST SAVINGS _______
- THROUGH SERVICE _______
- INCREASED RECOGNITION _______
- BETTER CUSTOMER SERVICE _______
- MORE SALES _______
- INCREASED COMPENSATION _______
- FAST TRACING _______
- PROMOTION _______
- EASIER WORK _______
- FEWER CLAIMS _______

3. List five features of Company X's service.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. What are five advantages (to a shipper) of Company X's service?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

5. What are five benefits (to a shipper) of Company X's service?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
REQUIRED ACTIVITY 45 - "Sales Presentation."

ACTIVITY DESCRIPTION:

Answer Questionnaire X, "Sales Presentation." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 80-109

People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

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REFERENCE TIME: 3 hours

NOTES:
Questionnaire X, "Sales Presentation."

1. After a Sales Representative delivers his opening and has learned through questioning and listening about a customer's situation, what is his next general step? Explain.

2. What three major elements should comprise a sales presentation?

3. At which point in the sales presentation should each of these major elements be brought out?

4. In what sequence should these three major elements be brought out? Why?
5. What is "reinforcing" and how does its effectiveness compare with handling objections? Why?

6. What three steps comprise the more general behavior of reinforcing?
REQUIRED ACTIVITY 46 - "Effective Listening."

ACTIVITY DESCRIPTION:

Answer Questionnaire Y, "Effective Listening." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 73-80

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

PROJECTED  ACTUAL

Beginning Date: __________________________   __________________________
Completion Date: __________________________   __________________________

REFERENCE TIME: 1 hour

NOTES:
1. Why are most individuals relatively poor listeners?

2. What are three factors which help explain why, without some training in listening skills, it is normal for most people to listen poorly?

3. What are the four main channels of communication that virtually everyone uses?

4. Which of these four channels of communication occupies the greatest portion of our communication time? Explain fully.
5. On the average, what percent of our communication time is spent in listening? Explain briefly.

6. Describe the attitude and steps to be practiced in order to achieve effective listening.
REQUIRED ACTIVITY 47 - "Closing the Sales Call."

ACTIVITY DESCRIPTION:

Answer Questionnaire Z, "Closing the Sales Call." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Selling Motor Carrier Service, pages 110-128
People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

Beginning Date: __________________________
Completion Date: __________________________

REFERENCE TIME: 2 hours

NOTES:
1. List two major reasons why many Sales Representatives often hesitate to specifically ask for business.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. List three ways in which a Sales Representative can overcome this hesitancy.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. Describe in detail the three steps which comprise the actual closing of the sales call.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
4. In which order should these steps be taken? Why?
REQUIRED ACTIVITY 48 - "Sales Call Evaluation."

ACTIVITY DESCRIPTION:

Ride with a Sales Representative at your training terminal until you have observed three complete sales presentations. Using the forms on the following pages, evaluate the effectiveness of each presentation in terms of the principles you have learned; specifically:

a) Opening the call.
b) Delivery of presentation.
c) Effectiveness of listening.
d) Reinforcing.
e) Handling Objections.
f) Closing the call.

RESOURCES:

Documents - Selling Motor Carrier Service, pages 62-128
People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check each evaluation form with the Training Administration Specialist. Each should accurately reflect the manner in which the Sales Representative handled each call.

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REFERENCE TIME: 30 hours (3 10-hour days)

NOTES: Because of the potentially sensitive nature of this activity, do not discuss it with anyone except the Training Administration Specialist. Your comments will be held in strict confidence.
Sales Call Evaluation

Name of account to which call was made:

__________________________________________________________________________

Date__________ Person Contacted__________________________________________

1. Evaluate the effectiveness of the call opening and describe how the
effectiveness of the call opening might have been improved.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

2. Evaluate the effectiveness of the presentation and describe how the
effectiveness of the presentation might have been improved.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
3. Evaluate how effectively the Sales Representative seemed to listen and describe how the Sales Representative might have listened more effectively.
4. Evaluate how effectively the Sales Representative reinforced positive statements and describe how the Sales Representative might have reinforced positive statements more effectively.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

5. Evaluate the effectiveness of the call closing and describe how the Sales Representative might have improved the effectiveness of the call closing.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Sales Call Evaluation

Name of account to which call was made:

________________________________________________________________________

Date____________ Person Contacted_______________________________________

1. Evaluate the effectiveness of the call opening and describe how the
effectiveness of the call opening might have been improved.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. Evaluate the effectiveness of the presentation and describe how the
effectiveness of the presentation might have been improved.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
3. Evaluate how effectively the Sales Representative seemed to listen and describe how the Sales Representative might have listened more effectively.
4. Evaluate how effectively the Sales Representative reinforced positive statements and describe how the Sales Representative might have reinforced positive statements more effectively.

5. Evaluate the effectiveness of the call closing and describe how the Sales Representative might have improved the effectiveness of the call closing.
Name of account to which call was made:

______________________________________________________________

Date_____________  Person Contacted______________________________

1. Evaluate the effectiveness of the call opening and describe how the effectiveness of the call opening might have been improved.

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

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2. Evaluate the effectiveness of the presentation and describe how the effectiveness of the presentation might have been improved.

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

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________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________

________________________________________________________________________________
3. Evaluate how effectively the Sales Representative seemed to listen and describe how the Sales Representative might have listened more effectively.
4. Evaluate how effectively the Sales Representative reinforced positive statements and describe how the Sales Representative might have reinforced positive statements more effectively.

5. Evaluate the effectiveness of the call closing and describe how the Sales Representative might have improved the effectiveness of the call closing.
REQUIRED ACTIVITY 49 - "Sales Aids."

ACTIVITY DESCRIPTION:

Answer Questionnaire AA, "Sales Aids." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Company X Sales Bulletins

People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 2 errors of any type will be noted.

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REFERENCE TIME: 1 hour

NOTES:
1. List the give-away items used by Company X Sales Representatives and describe how each is to be used.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
2. Identify sales aids which might be carried in the briefcase of a Company X Sales Representative.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
3. What are the following and how should each be used?
   a. Sales flyers.
   b. System maps.
   c. Market area maps.
   d. Mailing lists.

________________________________________________________________________
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Public Image Activities 50 - 51

The following activities deal with the techniques a Sales Representative can use to improve his personal and public image.
REQUIRED ACTIVITY 50 - "Local Organization Membership."

ACTIVITY DESCRIPTION:

Answer Questionnaire BB, "Local Organization Membership." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Local Chamber of Commerce Material

People - Terminal Personnel
  Sales Representatives
  Local Chamber of Commerce Personnel

MEASUREMENT AND STANDARDS:

Check your answers with your Terminal Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 2 errors of any type will be noted.

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REFERENCE TIME: 3 hours

NOTES:
1. List the traffic clubs in your terminal's vicinity. For each, list their goals and their criteria for membership.

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________


2. List other business organizations in your terminal's vicinity to which you might apply for membership to promote the good of Company X, the industry, and the community.

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________


3. For each of the traffic clubs and business organizations you listed, give the name of the senior officer.

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________
REQUIRED ACTIVITY 51 - "Appropriate Business Image."

ACTIVITY DESCRIPTION:

Answer Questionnaire CC, "Appropriate Business Image." Note the reference source next to each response. (It is acceptable to use your own experience or knowledge as a reference, if appropriate.)

RESOURCES:

Documents - Dress for Success

People - Division Sales Manager
Sales Representatives

MEASUREMENT AND STANDARDS:

Check your answers with your Division Sales Manager. If there is a dispute over the accuracy of your answers, your response will be considered correct if you can verify its accuracy. No more than 5 errors of any type will be noted.

TIME PLAN:

<table>
<thead>
<tr>
<th>PROJECTED</th>
<th>ACTUAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Date:</td>
<td>__________________________</td>
</tr>
<tr>
<td>Completion Date:</td>
<td>__________________________</td>
</tr>
</tbody>
</table>

REFERENCE TIME: 6 hours

NOTES: If you are a man, answer the questionnaire marked "MALE."
If you are a woman, answer the questionnaire marked "FEMALE."
1. According to recent research, which item of clothing is a man's most important status symbol?

2. List nine shirt patterns which are considered proper for business wear.

3. List seven tie patterns which are considered proper for business wear.

4. According to recent research, which colors are considered generally acceptable for a businessman's suit?

5. According to recent research, what suit patterns are acceptable?

6. What are four popular and acceptable styles for business shoes?
7. List sixteen dress rules for Sales Representatives which, according to recent research, always pay off.
Questionnaire CC, "Appropriate Business Image." (FEMALE) 217

1. According to recent research, what three hairstyles test well for businesswomen?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. According to recent research, what is the best outfit for a business woman's uniform? (Describe in terms of cut, material, pattern, and color.)

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. Describe the way in which a woman should dress who is engaged in business or industrial sales.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

4. List five accessories which test well for businesswomen.

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5. List five patterns for scarves which tested well for businesswomen.

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________________________________________________________________________
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6. List the three styles of scarves which tested well for businesswomen.

________________________________________

________________________________________

________________________________________

7. According to recent research, what are eight "believability outfits" for businesswomen?

________________________________________

________________________________________

________________________________________

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<table>
<thead>
<tr>
<th>NAME</th>
<th>DATE</th>
<th>BEGIN TIME</th>
<th>END TIME</th>
<th>TIME SPENT</th>
<th>ACTIVITY</th>
<th>PROJECT</th>
</tr>
</thead>
</table>

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## COMPANY X
### WEEKLY SCHEDULE
#### SALES ORIENTATION AND TRAINING PROGRAM

<table>
<thead>
<tr>
<th>Name</th>
<th>W/E</th>
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<table>
<thead>
<tr>
<th>Training Week</th>
<th>Terminal</th>
<th>Approved by Terminal Manager</th>
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<tbody>
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</tbody>
</table>

I. This week I will complete the following Required Activities (use Activity #'s):

II. I will also be working on these Required Activities that I have begun (use Activity #'s):

III. I will begin these Required Activities (use Activity #'s):

IV. This is my Required Activities schedule for the week (use Activity #'s):

<table>
<thead>
<tr>
<th>MON.</th>
<th>TUE.</th>
<th>WED.</th>
<th>THU.</th>
<th>FRI.</th>
<th>SAT.</th>
</tr>
</thead>
</table>

V. Comments:

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## COMPANY X
## SALES TRAINEE EVALUATION

### SALES ORIENTATION AND TRAINING PROGRAM

<table>
<thead>
<tr>
<th>Trainee Name</th>
<th>W/E</th>
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<tr>
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</table>

### I. Assess the trainee's proficiency regarding the skills he acquired this week (refer to Required Activity #'s and specific examples):

### II. Evaluate the trainee's management skills (refer to Required Activity #'s and specific examples):

### III. Assess the trainee's ability to use time efficiently (refer to Required Activity #'s and specific examples):

### IV. Comments:

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