



# Case Study

**PERFORMANCE DRIVEN SALES TRAINING**

IMPROVE REAL BUSINESS RESULTS BY INCREASING THE ENGAGEMENT, RETENTION, AND EFFECTIVENESS OF LEARNING



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## CASE STUDY

## D4 Sales Transformation

### A Non-Traditional Solution Brings Speed, Cost Effectiveness, and Engagement to Essential Sales Training

Time. Money. Internal resources. Employee adoption and engagement. These are just a few of the obstacles companies face when developing comprehensive sales training. Traditional approaches to training – whether online or instructor led – typically take months to develop, require many hours of learner time, and come with a hefty price tag. Even then, too often adoption can be spotty and employees fail to implement what is taught.



## About D4 Discovery

D4 is a leading provider of managed data and discovery services to law firms and corporations. The company's state-of-the-art data center operations in Rochester are complemented by electronic discovery and litigation support offices throughout the country. D4 has been recognized by Inc. magazine as one of the fastest-growing private companies in the United States for four consecutive years. Visit [www.d4discovery.com](http://www.d4discovery.com) for more information.



Most systems were too expensive, bloated with unneeded features, and required significant administrative resources. Plus, many offered a less-than-optimal mobile experience



## CHALLENGE

Philip Mooney, chief sales officer for D4, knew his geographically dispersed salesforce would benefit from formal sales training. A managed data and discovery services provider for law firms and corporations, D4 had grown significantly over recent years and had expanded its portfolio of offerings, many of which are based on complex technologies such as artificial intelligence. A recent acquisition had increased the sales team by 50 percent.

As the company added more offices around the United States, he began to notice inconsistencies in company and product positioning, in conducting sales calls, and in handling prospect questions and objections. "Our CEO, John Holland and I come from companies that invested significant time and dollars in sales training," said Mooney. "In addition to improving sales effectiveness, we both have seen how training can also support a company's culture. D4's culture is based on a 'do what it takes to deliver better' mentality. We wanted to make sure we preserved that commitment to customer service even as the company grew."

## SEARCH

Mooney turned to training veteran Marjorie Newell to develop and implement D4's first comprehensive sales training program. Because the sales training needed to be deployed online and accessible via mobile devices, one of Newell's first tasks was to find a suitable learning platform.

She began researching LMSs, only to find that most were very expensive, bloated with unneeded features, and required significant administrative resources. Plus, many offered a less-than-optimal user experience on smartphones and tablets. By chance, Newell saw an email for a complimentary webinar from mLevel, a provider of microlearning solutions. The presentation intrigued her and she scheduled a call to learn more details.





## CREDITS

### **D4 Employees:**

Active Learning

### **Photographer:**

Vasiliy Baziuk



## SOLUTION

“During the call, a light went on in my head,” said Newell. “I could see how this solution would fit our needs exactly. Plus, the interactive games created with the platform were sophisticated and fun, but required no coding. Up to this point, I had ruled out game-based learning for us because of its cost, complexity, and time to deliver.” When Newell showed the platform to the D4 executive team, Mooney and Holland were equally impressed.

D4 signed a contract with mLevel in early November. About a week later, Newell did a virtual training session that lasted approximately three hours. After the session, Newell immediately went to work.

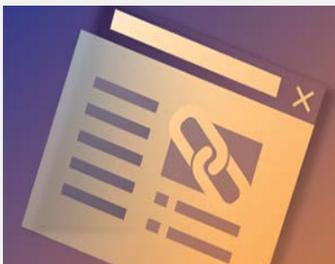
Less than three weeks after signing the mLevel contract, Newell presented to the D4 executive team the first sales training Mission. The Mission (analogous to an online course consisting of multiple learning activities) focused on D4's corporate history and positioning in the market and was launched to the sales team in December with a kick off call hosted by Mooney, during which the training was introduced and explained.

## RAPID DEVELOPMENT

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“Once information is collected, the process of creating a mission is very straightforward and takes just a couple of hours,” said Newell. “You add an overview description and any graphics you want to use for illustration. Next, you choose the activities you want to include in the mission, and then upload the content spreadsheet.

“You then create the game questions – either using question templates or creating them manually. One of the things we really like about mLevel is that it randomizes questions so that no matter how many times someone plays a game, the questions are never exactly the same.”



### RESOURCES D4 PLAYBOOK

Activity \_\_\_\_\_

### EXTERNAL LINK

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Each mission is a complete unit of study. Typically, a D4 mission is comprised of a Knowledge Navigator with essential, must know points, links to associated playbook, other external resources, one to three activities, and a video. Sales reps must score 95% or better on the activities to complete the mission.



### ENGAGING ACTIVITIES

Activity \_\_\_\_\_

### FAST LANE

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mLevel “gives you the ability to create highly structured, engaging, and fun training without instructional design experience,” Newell says. “The intelligence contained in its tools and activities automatically ensure users are going beyond simple recall of information and cognitively process, then apply knowledge.”



### OPEN BOOK ADAPTIVE LEARNING

Activity \_\_\_\_\_

### ACADEMY

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As students go through each mission, mLevel helps them create personalized study lists to identify topics that require more review. To further expedite the learning process, learners receive feedback both in-game and upon the completion of each activity.

# FIRST MISSION LAUNCHED IN LESS THAN THREE WEEKS

“When I did have a question, mLevel was very responsive in getting back to me with help and answers. This support definitely helped me get more done, faster”



Marjorie Newell  
Director of Training, D4

Newell worked directly with senior executives, primarily Holland and Mooney, to develop a detailed outline of the entire sales training initiative. She then worked with executives and professionals across the company to collect, prioritize, and organize information covering subject areas such as forensics, deposition services, technology and product engineering, marketing, and consulting.



**READY FOR LAUNCH**

In just \_\_\_\_\_  
**3 Weeks**

Seventeen more missions – covering product offerings, sales activity standards, identification of prospects and objection handling, marketing campaigns, and much more – were created and launched in the following ten weeks.



**17 ENGAGING ACTIVITIES**

with \_\_\_\_\_  
**1 Designer**

According to Newell, she was able to accomplish so much in such a short time because of senior executive buy-in, the commitment of subject matter experts, mLevel's accessibility for support, and easy content development process.

CASE STUDY

# DATA DRIVEN RESULTS

The right analytics can help managers monitor performance and progress, identify top performers, and see where employees may need some extra help or coaching. Using the data provided, Newell is able to assess knowledge gaps and topics that need to be supplemented with additional information and training. She also monitors day-to-day activity, identifies top performers, and assesses mastery by topic. These reports, which can be scheduled or produced ad hoc using mLevel Analytics, are easily generated with a couple of clicks.

Learners also received helpful insights on their performance during and at the end of each session. In just a few short months, Martha MacPherson, Vice President of D4 marketing, is already seeing positive results. "In addition to an uptick in leads, we're seeing much more engagement, especially among junior reps, and better utilization of the resources we offer – from email templates to e-books and whitepapers to postcards," she said. "And when reps call us, they're asking better questions, which to me demonstrates that they are absorbing and applying the information."



## CASE STUDY

## EARLY IMPACT ON SALES

"In less than seven months, we have trained sales and marketing on the spectrum of D4 products, services, and processes. As a result, we have never been in greater alignment as a team," said Mooney. "This training gives us the ability to deliver a consistent message to clients and prospects and bring new hires up to speed faster than ever before. We fully expect to see a full return on our investment in this first year."

He continued. "We have a very large and complex portfolio of offerings. The information we're now providing to reps will help them understand the offerings better and prepare them for handling objections and competition. Just by raising the size of each deal, we'll see a revenue benefit." According to Mooney, the reaction from sales reps has been very positive. "Besides being appreciative of the effort involved, reps recognize the training will help them sell more effectively."



Kait Jack,  
*Field Marketing Manager*

We fully expect to see a full return on our investment in this first year...Just by raising the size of each deal, we'll see a revenue benefit

In addition to helping sales reps better use marketing, the training has also helped McPherson's marketing team better understand sales. "The training has definitely helped me be better in my role at D4," said Kait Jack, Field Marketing Manager. "Knowing more about what the sales team is responsible for on a daily, weekly, and monthly basis has helped me tailor my materials to more closely fit their needs."

## POSITIVE FEEDBACK

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According to Mooney, the reaction from sales reps has been very positive. "Besides being appreciative of the effort involved, reps recognize the training will help them sell more effectively."

"Sales reps like that the information is provided in short chunks. Each game takes only a few minutes to play," said Newell. "And the mobile access is also a plus. For instance, one rep in Chicago tells me he plays the game on his train commute."

Mooney plans to reinforce the training missions later this year in a credentialing exercise that will engage the reps in role playing exercises with senior executives



### 1 Gene Tenuta, *Managing Director*

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"When I first heard of this training program, I was concerned. My past experiences with corporate training have been boring and non-motivational. This training has been the total opposite. In fact, the training fed into what motivates me - competition. The games work perfectly for how I am wired. I want to learn because I want to win."

### 2 Martha MacPherson, *VP of Marketing*

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When reps call us, they're asking better questions, which to me demonstrates that they are absorbing and applying the information. The mLevel platform provides a way to communicate important information in a structured, but fun, engaging way. It's how we can ensure sales and marketing don't get siloed and work in tandem."



## WHAT WE LEARNED

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The results from this study of the D4 Sales Training Initiative support that the proper use of engaging learning activities, microlearning methodology, analytics and a lean learning design approach have a significant positive return on investment.



## IS YOUR LEARNING PERFORMANCE DRIVEN?

Schedule your **learning assessment** with a **certified learning architect** by visiting

[www.mLevel.com](http://www.mLevel.com)

### About mLevel

mLevel is a microlearning solution that produces more effective learning outcomes by improving knowledge retention and skill application. With mLevel, you gain a measurable understanding of what your learners do and don't know by leveraging highly interactive learning activities to promote lasting results. mLevel helps learners elevate their knowledge and skills through an engaging learning experience that promotes rapid time to performance.