



Adaptation Manual



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Introduction and Rationale

The Learning for Inside Sales Agent (LISA) project was launched to address a critical skills gap in sales education. Inside sales - the practice of selling products or services remotely rather than through face-to-face meetings - has become *increasingly* important in modern business due to digital transformation and changing buyer behaviours. Yet, traditional university programs have not kept pace with these industry shifts. Organizations report a “talent crisis” in sales, where roles like inside sales representative are among the most sought-after, but educational offerings for these roles remain scarce. To bridge this gap, the LISA project has developed a **5 ECTS** (European Credit Transfer System) training course (~125 hours of student work) specifically for universities. This course aims to produce “work-ready” graduates with the digital, analytical, and communication skills needed for contemporary inside sales positions, thereby enhancing students’ job prospects and meeting industry demand. At the same time, the project envisions upskilling existing sales professionals through university extension programs, ensuring the current workforce remains competitive in an era of automation and AI-driven sales.

Purpose of this Manual:

This adaptation manual is a formal guide for universities and higher education institutions across Europe to adopt and integrate the LISA training materials into their curricula. It provides a structured roadmap for implementation. The manual aligns with LISA’s broader goal of strengthening the link between academia and industry - helping universities update their sales education offerings and **produce graduates who are well-equipped for evolving inside sales roles**. By following this guide, institutions can flexibly deliver the LISA course content in various formats (synchronous, asynchronous, or blended) while adapting to local academic regulations and practices. Ultimately, this manual will assist educators in incorporating the **Inside Sales** curriculum either as a standalone 5 ECTS course or as part of existing programs, thereby contributing to the modernization of business education in Europe. It emphasizes practicality over promotion: the focus is on pedagogical adaptation and curriculum alignment rather than marketing. All recommendations are grounded in the LISA project’s research and pilot experiences, ensuring the guidance is evidence-based and aligned with the final validated course content.



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1. Manual structure and content definition

1.1. Objectives and benefits of the LISA training approach

The LISA (Learning Inside Sales Academy) training approach has been developed in response to profound shifts in how organizations structure, execute, and scale their sales operations. As business-to-business (B2B) sales environments become increasingly digitized, decentralized, and data-driven, there is an urgent need for educational models that equip learners with both the theoretical understanding and the applied skills to navigate this new landscape. LISA answers this call by offering a structured, modular, and competence-based training program tailored to the realities of modern inside sales.

The overarching objective of the LISA training approach is to professionalize the inside sales function through education. While inside sales has emerged as a strategic pillar in many industries, from SaaS and advanced manufacturing to financial services and digital health, it remains underrepresented in formal business curricula. LISA addresses this gap by constructing a comprehensive educational pathway that not only introduces the core concepts and operational models of inside sales but also fosters the interpersonal, technological, and analytical competencies necessary for success in remote selling roles. By aligning the program with EQF level 6-7 descriptors, the LISA approach ensures that learners develop capabilities suitable for both undergraduate and postgraduate professional contexts.

At the heart of the LISA methodology is a competence-oriented pedagogy. The program does not merely impart theoretical knowledge but emphasizes the integration of this knowledge into real-world scenarios. Each module is built around applied learning outcomes that combine conceptual understanding with situational judgment, technical literacy, and communication skills. This ensures that learners are not only able to describe the components of an inside sales process, for instance, but also to apply them in dynamic environments, use enabling technologies effectively, and adapt to different organizational structures and client expectations.

Another critical objective of the LISA training model is to reflect the collaborative and distributed nature of contemporary sales work. Inside sales is no longer a siloed or purely transactional function; it operates at the intersection of marketing, customer success, and product development. The LISA curriculum is designed to mirror this complexity, with modules dedicated to teamwork, cross-functional communication, and the use of digital tools for coordination and transparency. This fosters a systems-thinking mindset in learners and encourages them to see sales not as a standalone activity, but as a collaborative process embedded within wider organizational strategies.

The benefits of the LISA approach extend beyond individual skill acquisition. For educational institutions, it offers a scalable and modular framework that can be integrated into existing

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business programs or delivered as standalone courses for professional learners. Its flexible structure supports both synchronous and asynchronous delivery, allowing adaptation to institutional calendars, pedagogical traditions, and target learner profiles, including full-time students, part-time professionals, and those engaged in reskilling initiatives. Moreover, the inclusion of multimedia resources, real-world case studies, and digital simulations strengthens learner engagement and supports various learning styles.

From an employer perspective, the LISA training pathway cultivates job-ready professionals who are conversant in the tools, techniques, and collaborative practices of modern sales environments. Graduates of the program are better prepared to operate in hybrid teams, interpret data insights, manage sales pipelines through CRM systems, and conduct client interactions across virtual channels, all of which are core competencies in today's digital economy.

In sum, the LISA training approach represents a forward-looking and practice-based model for sales education. It aims to enhance the employability and adaptability of learners, support curriculum innovation in higher education, and contribute to the broader professionalization of inside sales. By aligning pedagogical rigor with workplace relevance, LISA serves as a blueprint for how vocational education can respond to the evolving demands of digitally mediated professions.

1.2. Teaching & Adaptation Guidelines

Fundamental Course Design Principles

The LISA manual begins by outlining core pedagogical principles. The curriculum is modular and competence-based: it consists of five standalone yet interlinked modules, each with clear learning outcomes and associated skills development. This structure allows programs to adopt the course as a full 5-credit offering or to integrate individual modules into existing programs as needed. LISA embraces competency-based education (CBE) so that students progress by mastering specific sales competencies (rather than by seat-time). This approach is aligned with contemporary higher-education practice and has been shown to improve skill acquisition for real-world careers. The materials are also designed for inclusive and flexible delivery: content and activities can be adapted for various student backgrounds and learning preferences. Throughout, the manual stresses alignment with ECTS conventions: the total student workload for the full course is ~125 hours (5 ECTS), ensuring academic credibility and transferability. Each module's outcomes (such as analytical thinking, use of sales technology, or communication skills) are mapped to broader program goals to facilitate credit assignment and accreditation.

Modular Course Structure

The content is organized into five progressive modules, covering fundamental concepts through advanced applications. For example, Module 1 introduces the inside-sales work model and its business rationale, while later modules address the sales process, team collaboration, data analytics, and sales technology. These topics were determined by LISA's research and pilot testing. Because each module is largely self-contained, institutions have flexibility to structure the course:





a 12-week semester might allocate 2 weeks each to Modules 1-3 and 5, and 3 weeks to the hands-on Analytics module. An introductory week and a concluding review week may be added. Within each module's span, instructors blend lectures with interactive work. The manual explicitly recommends frequent Q&A, case discussions, and group tasks to link theory with practice. For example, Module 2 could begin with a live walkthrough of a standard inside-sales pipeline (using a CRM mock-up), followed by a class role-play of customer dialogues at each stage. If modules are taught separately (e.g. integrated into different courses), the guidance is to provide context from Module 1 so students understand the overall inside-sales framework. This ensures that, whether delivered as a cohesive 5-credit course or in split format, the structure remains coherent and student-centered.

Synchronous Learning Implementation

In structured academic environments, such as conventional face-to-face classrooms or real-time online seminars, the LISA training programme is best delivered over the course of a semester or through an intensive block-teaching format. The adaptation manual proposes a flexible but well-defined timeline that aligns with institutional calendars. For instance, in a standard 12-week semester, instructors might allocate two weeks each for Modules 1, 2, 3, and 5, while dedicating three weeks to the more technically demanding Module 4, which addresses sales analytics and data literacy. This modular flexibility allows educators to adjust pacing based on learner profiles, programme level, or institutional priorities.

Synchronous delivery should combine traditional didactic methods with active learning formats that support applied competence development. A typical session might begin with a focused lecture segment, supported by curated slides, real-world data, or short video materials drawn from the LISA mediacast collection. This introductory framing should immediately transition into participatory discussion or guided analytical tasks, helping students to link theoretical insights to professional realities. Instructors might pose prompt questions such as "In what ways has digitalisation altered the structure of sales organisations?" or "How do remote collaboration tools reshape customer interactions?", thereby fostering critical reflection on evolving sales practices.

The manual encourages a deliberate instructional design that accommodates interactivity even in larger cohorts. For example, instructors are advised to embed structured "think-pair-share" segments, timed reflection pauses, or breakout-group activities within the session. In this way, discussion remains dynamic and inclusive, regardless of class size. Modules grounded in workflow or role-based practices, such as Module 2 (sales processes) and Module 3 (team communication), particularly benefit from role-play exercises, collaborative simulation tasks, and peer critique. These pedagogies mirror real workplace conditions and allow students to rehearse key soft skills in a safe, guided setting.

In addition to conventional seminar activities, the manual recommends hands-on technical sessions, particularly when teaching content such as sales technologies and data visualisation (Module 4). These may take the form of computer-lab workshops or guided digital labs using CRM interfaces, spreadsheet tools, or dashboard software. In such sessions, students might be asked to construct and interpret a sales performance dashboard, develop mock forecasts, or analyse anonymised lead qualification data.

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To enrich the synchronous experience and promote inter-modular continuity, institutions are encouraged to deploy team-teaching models. For example, a faculty member specialising in analytics may deliver focused input on data governance during Module 4, while a sales practitioner from industry might facilitate a role-play session in Module 3 on team communication in virtual client settings. The manual provides a modular breakdown that facilitates this division of labour, ensuring that different instructors can coordinate effectively around common learning assets, such as the LISA video segments, standardised slide decks, or case files.

Importantly, synchronous sessions should also serve as launch points for ongoing formative work. Assignments such as designing a simplified sales pipeline diagram, drafting a personalised customer engagement email, or scripting a virtual product pitch are all examples of applied exercises that consolidate classroom instruction with professional practice. These activities enable learners to rehearse key techniques, receive real-time feedback, and progressively build the competencies central to the inside sales profession.

By aligning synchronous instruction with real-world scenarios, structured reflection, and multimodal inputs, educators can ensure that LISA modules are not only academically rigorous but also directly relevant to students' future careers in the evolving digital sales landscape.

Asynchronous Learning Implementation

When delivering the LISA curriculum in a fully online or asynchronous format, it is essential that the content is pedagogically structured and technologically accessible. The success of self-paced delivery hinges not only on the quality of materials provided but also on the coherence and clarity with which they are organised within the learning management system (LMS) - see https://lisaplatform.saleseducation.eu/login.php?client_id=lisapri. Each module should be designed as a stand-alone unit, comprising a well-balanced mix of multimedia content (recorded mediacasts, slide decks, curated readings), formative assessments (such as quizzes and scenario-based exercises), and clear guidance on pacing and expectations.

The adaptation manual emphasises that LISA was explicitly designed with independent learning in mind. However, autonomy does not mean isolation. To promote sustained engagement and prevent learner attrition, instructors should build in structured support mechanisms. Weekly checkpoints, such as brief quizzes, short reflective writing assignments, or micro-case analyses, can help students remain accountable and receive timely, formative feedback. These low-stakes interventions also allow educators to track progress and address misunderstandings before they compound.

The presence of an online tutor or facilitator is strongly recommended. Even if formal instruction is limited, asynchronous learners should have access to an interactive channel where they can raise questions, clarify technical issues, or share reflections on content. A well-managed discussion board can simulate peer interaction, especially when instructors use it strategically, for example, by assigning weekly prompts tied to real-world scenarios and requiring student contributions. Promoting a culture of constructive peer feedback, and incorporating elements of peer review, further enhances the collaborative dimension of independent learning.

Clarity and transparency are critical to learner success in this format. The course syllabus, module descriptions, and weekly task lists must be explicit and consistent. Each learning unit should begin

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with a concise overview of the objectives, a breakdown of the resources provided, estimated completion time, and specific deliverables. This scaffolding ensures that learners can orient themselves within the course structure and understand how each activity contributes to the overall progression of knowledge and competence.

While there are no fixed class hours, the workload must be equivalent to synchronous formats. A 5-ECTS LISA course implies a commitment of approximately 125 hours over the term. To help learners self-manage, instructors should provide a week-by-week schedule that suggests when to engage with each component. Milestones such as “By the end of Week 3, you should have completed Modules 1 and 2 and submitted Quiz 2” help learners track their own pace against expectations. This structured flexibility is particularly valuable for part-time students or working professionals balancing multiple responsibilities.

Technical accessibility also plays a critical role in ensuring equity. All content should be mobile-friendly and compatible with commonly used devices and operating systems. Video mediacasts must include closed captions and, where possible, transcripts, to support learners with auditory or linguistic needs. Slide presentations should be available in downloadable formats, and interfaces should be intuitive, with minimal navigational complexity. Embedded assessments, such as scenario-based quizzes or decision-tree exercises, should provide immediate, constructive feedback to reinforce learning.

Instructors are encouraged to use brief introductory clips or microlearning assets to spark engagement. For example, a short two-minute video that introduces the realities of modern inside sales roles can be paired with a reflective activity where students identify key competencies required for remote sales careers. These elements allow students to quickly apply concepts and connect theory to practice, even without real-time instructor presence.

Ultimately, the asynchronous delivery model is well suited to learners seeking high flexibility, such as adult learners, career switchers, or professionals engaging in upskilling. Yet its success depends on more than content availability, it requires thoughtful instructional design, regular feedback loops, and a pedagogical commitment to inclusion, clarity, and continuity. When implemented with care, the LISA training programme offers a robust and adaptive model for digitally mediated, competence-based sales education.

Blended and Flexible Formats

Many programs will adopt a hybrid approach that combines face-to-face and online elements. One common model is the flipped classroom: students review core content (videos, readings, slides) on their own before class, and synchronous sessions are devoted to discussion and applied practice. For instance, learners could watch a recorded lecture on negotiation strategies as homework and then spend class time role-playing negotiation scenarios. The manual notes that blending these modes leverages the strengths of both: asynchronous delivery provides flexibility and allows learners to absorb material at their own pace, while live interaction deepens understanding through social learning. This hybrid model can be particularly effective for executive education or part-time students, who may value the ability to self-study but also benefit from cohort discussions. The flexibility of LISA’s design means instructors can also reassemble modules to fit different curricular structures. Some institutions may introduce LISA as a standalone 5-credit

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elective in a business program, ensuring all five modules are covered sequentially. Others might incorporate single modules into existing courses: for example, Module 4 (Sales Data Analytics) could be embedded in a broader Marketing Analytics course, or Module 3 (Team Collaboration) included in a Sales Management class. In such cases, the manual advises maintaining cohesion by sharing relevant content; for example, if Module 1's context is not covered elsewhere, instructors should still provide students with an equivalent introduction to inside sales. In every scenario, the curriculum planner's role is to tailor the delivery format (fully in-person, fully online, or mixed) to their institutional context while preserving LISA's learning objectives and academic rigor.

Illustrative Implementation Examples

To aid planning, the manual includes concrete examples of workload distribution and assignments. One sample breakdown allocates student time by module and activity. For example, Module 1 ("Understanding Inside Sales") is apportioned roughly 30 hours of student work: about 10 hours of lectures/readings, 5 hours of interactive class work, 5 hours of assignments and reflections, 5 hours of practical exercises, and 5 hours for exam preparation. Module 2 ("Inside Sales Process") is about 25 hours total, broken into 7 hours lecture, 4 hours interactive activities, 5 hours assignments, 5 hours practicals, and 4 hours assessment prep. This example aligns with the overall 125-hour total for the 5 ECTS course. In a semester context, such a schedule might translate to the 2-2-2-3-2 week distribution noted above.

In practice, instructors could implement these examples on an LMS. For instance, each week's module could begin with a short introductory video posted online, followed by a discussion thread where students analyze a sales scenario from that week's topic. Online quizzes can reinforce learning: after reading the section on pipeline management, students might take a quiz identifying CRM steps. In lab sessions or live meetings, an illustrative assignment could be for students to create a simple sales-report dashboard using spreadsheet software and present key KPIs to the class. These assignments ensure that students not only consume content but actively apply LISA concepts. Throughout, the manual encourages contextual adaptation: for example, module examples can be localized (e.g. case studies in a student's region or industry) or supplemented with guest lectures from local sales professionals. These illustrative scenarios demonstrate how the LISA materials can be turned into engaging learning experiences across modalities.

Assessing Quality and Learner Outcomes

Effective implementation requires ongoing evaluation using relevant indicators. Potential quality metrics include student engagement rates (such as attendance in synchronous sessions or activity in online forums), module and course completion rates, and attainment of learning outcomes. For example, instructors can gauge demonstrated competence through graded projects (e.g. a capstone analytics assignment or a role-play graded against a rubric) and track what percentage of students meet defined sales-skill benchmarks. Student satisfaction and self-efficacy can be measured via end-of-course surveys addressing confidence in digital sales skills. Collecting such data is in line with LISA's evidence-based approach - indeed, pilot testing data were used to refine the curriculum - and supports quality assurance under Erasmus+ guidelines. In summary, institutions should set KPIs that reflect LISA's goals (digital readiness, employability, pedagogical

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innovation) and monitor them to ensure the course delivers its intended outcomes. For example, high rates of students successfully completing the full 5-ECTS course, reporting mastery of inside-sales competencies, and expressing confidence in job-related skills would indicate that LISA has been integrated effectively.

1.3. Structure of the Course

On the basis of received information and research findings, the whole course has been divided into 5 modules (Table 1):

Table 1 Division of the LISA Course

MODULE	Topics
1. Inside Sales Work Models	Introduction (sales tech in inside sales, technological skills, sales tech infusion, tech readiness)
	Why inside sales is crucial and the benefits for the firm
	Inside Sales career paths and “streams” (CSM, SDM)
	Inside Sales Work Model
	Me as an Inside Seller - Now and Future
2. Manage Global Sales form your (home) office - The Inside Sales Process	Sales processes in inside sales
	Leveraging the inside sales process
	Cross selling / Upselling
	How to manage the pipeline and productivity tools (CRM..., scheduling)
3. Inside sales team	Building team atmosphere
	Presentation skills and preparing materials
	Inside sales communications (remote/in person)
	Collaboration and teamwork tools in inside sales (sales tech)
5. Sales analytics	(how to) Data visualization, structure, governance and analytics
	Usage of various sales technologizes and sales analytics
	Inside sales and data analysist work
4. Data insights	Role of data in inside sales
	Data collection, literacy, governance and analytics
	Sales technologizes, CRMs and AI tool
	Collaboration and communications within the team

Source: Author's own

Workload breakdown



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Having the Course structure and Course Module division, there is suggested workload for each of the Module (Tables 2 and 3). The whole Course is equivalent of 5 ECTS, which is ca 125 hours.

Table 2 Workload in different Modules

MODULE	Time workload	Breakdown
1. Inside Sales Work Models	30 hours	Lectures and Reading (10 hours)
		Interactive Activities (5 hours)
		Assignments and Reflections (5 hours)
		Practical Exercises (5 hours)
		Assessment Preparation (5 hours)
2. Manage Global Sales form your (home) office - The Inside Sales Process	25 hours	Lectures and Reading (7 hours)
		Interactive Activities (4 hours)
		Assignments and Reflections (5 hours)
		Practical Exercises (5 hours)
		Assessment Preparation (4 hours)
3. Inside sales team	20 hours	Lectures and Reading (6 hours)
		Interactive Activities (4 hours)
		Assignments and Reflections (3 hours)
		Practical Exercises (4 hours)
		Assessment Preparation (3 hours)
5. Sales analytics	25 hours	Lectures and Reading (7 hours)
		Interactive Activities (4 hours)
		Assignments and Reflections (5 hours)
		Practical Exercises (5 hours)
		Assessment Preparation (4 hours)
4. Data insights	25 hours	Lectures and Reading (7 hours)
		Interactive Activities (4 hours)
		Assignments and Reflections (5 hours)
		Practical Exercises (5 hours)
		Assessment Preparation (4 hours)

Source: Author's own

Table 3 Suggested division of the workload in different Modules



Module	Student Time Allocation (approx.)	Lectures & Readings	Interactive Activities (e.g. discussions)	Assignments & Reflections	Practical Exercises	Assessment Prep (study, revision)
Module 1: Understanding Inside Sales	~30 hours	10 hours	5 hours	5 hours	5 hours	5 hours
Module 2: Inside Sales Work Model	~25 hours	7 hours	4 hours	5 hours	5 hours	4 hours
Module 3: Team Collaboration	~20 hours	6 hours	4 hours	3 hours	4 hours	3 hours
Module 4: Sales Data Analytics	~25 hours	7 hours	4 hours	5 hours	5 hours	4 hours
Module 5: Inside Sales Tech	~25 hours	7 hours	4 hours	5 hours	5 hours	4 hours

Source: Author's own



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Modules content

Module 1		
	Expectancy	Clarification
1	Title of the module	Inside Sales Work Models
2	Short overview	The first module provides a foundational understanding of the inside sales domain, including its scope, importance, and key concepts. Inside sales is defined as the practice of selling remotely (via phone, email, video calls, etc.) rather than through in-person meetings. This module examines why inside sales has become crucial for modern businesses and how it differs from traditional outside sales roles. Students learn about the evolution of inside sales in response to technology and market trends, and the strategic benefits it brings to companies, such as increased cost efficiency, scalability of sales operations, and enhanced customer engagement through digital channels. By understanding these benefits and the role of inside sales within a firm's sales strategy, students gain insight into why many companies are rapidly adopting inside sales models.
3	Expected learning outcomes	The following learning outcomes are expected in the module: 1. Knowledge: • The student understands the evolution and growing relevance of inside sales as a strategic component of modern business models, particularly within B2B environments. • The student has advanced knowledge of the distinctions between inside and outside sales and recognizes the key technological, organizational, and economic factors driving the shift toward remote sales models. • The student is familiar with the historical and theoretical foundations of inside sales, including key typologies, roles, and operational structures as discussed in academic and practitioner literature. • The student understands the benefits of inside sales, including cost efficiency, geographical scalability, team





4		collaboration, and sales performance monitoring, and can articulate their value for sustainable and digitally enabled business strategies. 2. Skills: • The student is capable of critically analyzing different salesforce configurations and adapting inside sales models to varied business contexts. • The student can interpret and apply sales-related data to assess the performance and potential of inside sales strategies, and formulate basic remote engagement scenarios. • The student can explain the sales process from prospecting to post-sales support and differentiate it from telemarketing practices. • The student is able to identify relevant inside sales tools (e.g., CRM systems, communication platforms) and assess their role in enhancing commercial productivity and team collaboration. 3. Competencies: • The student is able to integrate knowledge of digital transformation, communication, and organizational change to contribute to the design or optimization of inside sales functions in real-world environments. • The student demonstrates autonomy in acquiring and applying new knowledge relevant to the evolving role of sales professionals, particularly in virtual and hybrid commercial settings. • The student shows sensitivity to intercultural and ethical dimensions of client relationships in a digital context and understands the inclusive potential of remote work structures. • The student is able to function effectively within a collaborative sales environment, contributing to sustainable commercial strategies by leveraging digital tools and cross-functional coordination.
	Length of the module	30 hours of students' workflow
	Learning topics	• Foundations and Evolution of Inside Sales: This segment introduces the concept of inside sales as a modern, digitally enabled business function. It traces



		the historical development of remote selling practices, emphasizing the role of digital tools such as CRM platforms, sales automation systems, and virtual communication technologies. Particular attention is paid to the socio-economic and technological shifts that have accelerated the adoption of inside sales globally, including changes in buyer behavior, workforce expectations, and post-pandemic business models. • Strategic Importance and Organizational Value: This section explains why firms increasingly integrate inside sales into their broader commercial strategies. It outlines the operational and strategic benefits, such as improved cost efficiency, reduced carbon footprint, faster market responsiveness, and enhanced scalability. The module draws on industry evidence to position inside sales as a critical lever for digital transformation, particularly in data-driven B2B contexts. Students are introduced to key research insights and labor market trends showing the growth of roles like Business Development Representatives (BDRs) and Sales Development Representatives (SDRs). • Comparative Analysis: Inside Sales and Field Sales: Here, students examine the structural and functional distinctions between inside and outside (field) sales models. Emphasis is placed on the division of labor, account types, and phases of the sales pipeline typically handled by each. Through examples and role scenarios, learners explore how hybrid sales teams operate in practice, demonstrating how inside sales supports or complements field sales efforts in complex or distributed sales processes. • Professional Roles and Career Pathways in Inside Sales: This section maps out the primary roles within inside sales functions, including SDRs, BDRs, Account Executives, and Customer Success Managers. Beyond role descriptions, students gain insight into the typical skills and digital proficiencies associated with each position. The module presents inside sales as a viable and dynamic career track, offering progression opportunities within both SME and enterprise-level
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6		sales organizations. This career orientation element helps learners situate their personal development goals within the wider professional landscape of digital and remote-first commerce.
	Learning materials	• Video • Podcasts • Case studies • Articles • Books
7	Evaluation	• Self-evaluation test

Teaching and Adaptation Guidelines

The pedagogical implementation of Module 1 must reflect its dual function within the LISA curriculum: first, as an academic introduction to the profession of inside sales, and second, as a foundational module anchoring the entire learning path. It is both a conceptual starting point and a strategic framework through which the subsequent modules, focused on operational models, team dynamics, data literacy, and sales technology, derive coherence and progression.

This module is designed to familiarize learners with the emergence and strategic value of inside sales as a contemporary sales model. It frames inside sales not as a peripheral function, but as a fully professionalized domain with defined roles, processes, and technologies. As such, educators should ensure that Module 1 introduces students to the contextual drivers of inside sales growth: digital transformation, evolving customer behaviour, remote work environments, and sustainable business models.

Given its broad conceptual reach, Module 1 is suitable for delivery in both synchronous and asynchronous instructional formats, and is fully adaptable to institutional calendars and local pedagogical practices.

Synchronous Delivery

In classroom-based or hybrid settings, Module 1 should begin with an instructor-led lecture that outlines the historical development, economic rationale, and current dynamics of inside sales. Teaching should be anchored in empirical evidence and market intelligence, including data from partner institutions or local case examples, highlighting how inside sales responds to contemporary business challenges.

Educators are encouraged to use core multimedia content provided within the LISA platform, such as the mediacasts “Why Inside Sales?”, “Inside Sales Path”, and “Tasks of the Inside Seller.” These should serve not merely as instructional media but as prompts for structured reflection and group discussion. Practical learning activities may include:

- Group debates on the distinctions between inside and field sales.
- Analyses of job postings to identify emerging inside sales roles and competencies.
- Reflection exercises on the impact of digital tools (e.g., CRM, automation) on the sales profession.





Incorporating real-world artifacts, such as current recruitment advertisements, sales strategy documents, or interview clips with sales professionals, can enhance engagement and relevance. This instructional approach helps connect theoretical content with emerging industry demands.

Asynchronous Delivery

For distance or flexible learning modes, the module content can be delivered through modular digital packages within institutional LMS environments or available online at https://lisaplatform.saleseducation.eu/login.php?client_id=lisapri. Students can be tasked with asynchronous group projects, such as creating a presentation on the evolution of the sales profession, or mapping career pathways based on actual organizational sales structures. To accommodate adult learners or professionals in upskilling programs, the materials can be segmented into microlearning units, allowing learners to progress through the content independently and at their own pace. Suggested activities include peer-reviewed case analysis or short video reflections on digital readiness for sales careers.

Content Localization and Institutional Integration

Module 1 is designed for flexible integration into a range of academic programs, whether as a standalone introduction to digital commerce or as part of a broader business or marketing curriculum. Institutions can align its delivery with national frameworks (e.g., ECTS guidelines) and pedagogical cultures, including semester- or block-based formats.

Educators are encouraged to incorporate regionally relevant examples and market insights. For instance, institutions may emphasize sectors where inside sales adoption is particularly strong (e.g., software, advanced manufacturing, SaaS platforms) or include guest speakers from local businesses practicing inside sales.

The modular structure also allows adaptation across different levels of academic programs, from upper undergraduate to professional postgraduate contexts, making it suitable for diverse learner groups.

Educational Design and Competence Orientation

Consistent with the LISA project's emphasis on competence-based education, Module 1 should be delivered in a manner that promotes not only theoretical knowledge but also its real-world applicability. Instruction should emphasize learners' capacity to interpret, contextualize, and act on the principles of digital sales work.

Learning activities should develop a foundational understanding of:

- The business rationale for inside sales models.
- The roles and career paths available within the profession.
- The strategic and operational differences between inside and outside sales.
- The enabling role of technology and digital infrastructure in remote selling.

These elements are aligned with EQF Level 6-7 descriptors and support broader employability and digital readiness outcomes.





Sustainability and Inclusion Focus

Educators should explicitly connect the growth of inside sales with sustainability and inclusion drivers, reduced travel, digital equity, flexible remote work structures, and accessibility of sales careers to wider demographic groups. This focus helps students understand the broader societal relevance of the profession and situates inside sales within evolving norms of responsible business.

Strategic Use in Curriculum Innovation

Finally, Module 1 can serve as a pilot module for curriculum renewal and digital learning experimentation. It is suitable for institutions seeking to explore flipped classroom models, blended delivery, or competency-based credentialing. It's clear scope, multimedia support, and adaptability make it ideal for testing scalable, digitally enabled teaching formats that align with the LISA model.

By the end of the module, students should be able to define and contextualize the inside sales profession, critically assess its strategic relevance, and recognize its evolving career landscape. These learning outcomes provide the conceptual platform for deeper operational, collaborative, and technical skill development in subsequent modules.



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Module 2		
1	Expectancy	Clarification
	Title of the module	Manage Global Sales form your (home) office -
	Short Overview	Module 2 explores the structural and procedural frameworks that shape inside sales operations within diverse business environments. It offers students a critical understanding of how inside sales functions are configured in practice, emphasizing the interplay between organizational context, technological support, and structured workflows. Positioned as a continuation of the conceptual foundation laid in Module 1, this module addresses the operational backbone of the inside sales profession. At its core, the module introduces learners to the various configurations of inside sales teams, such as centralized, regional, hybrid, and embedded models, demonstrating how these affect roles, responsibilities, and collaboration dynamics. Through real-world examples, such as the case of TechSolutions, students encounter the nuances of service sales, business development, sales closure, and hybrid functions. These configurations are analyzed in relation to organizational strategy, size, and industry. Simultaneously, the module provides a comprehensive treatment of the seven-step sales process, adapted for remote and digital-first environments. From prospecting and lead qualification to handling objections and post-sale engagement, each phase is explored both theoretically and through application-oriented materials. Learners engage with sales workflows that rely heavily on CRM systems, digital presentation tools, and data-driven prospecting methods, equipping them to navigate the evolving landscape of remote B2B selling. Moreover, attention is paid to performance optimization strategies, including cross-selling, up-selling, and time management techniques. Students are introduced to process formalization, the



3		role of collaborative workflows, and the integration of motivational and technological success drivers. These competencies are linked to both customer value creation and organizational outcomes. Throughout the module, learners are encouraged to assess the interdependence of roles within inside sales teams, understand how sales configurations impact customer engagement, and apply structured methods to sales scenario design and process improvement.
	Expected learning outcomes	The following learning outcomes are expected in the module: 1. Knowledge: • Understands the structure and operational logic of various inside sales models (centralized, decentralized, hybrid) and their relevance in different organizational contexts. • Demonstrates in-depth knowledge of the sequential stages of the inside sales process, from lead generation to post-sale follow-up, including cross- and up-selling techniques. • Recognizes the strategic role of process formalization and workflow alignment in enhancing sales productivity and customer value. • Identifies the interrelation between team structures, digital sales tools (e.g. CRM systems), and sales performance metrics in remote selling environments. 2. Skills: • Can analyze and map out an inside sales process tailored to specific business goals and customer profiles, applying critical thinking to real-world contexts. • Is capable of evaluating and optimizing workflow stages for increased efficiency, using appropriate digital tools and sales technology platforms. • Can simulate and role-play sales conversations at different stages of the pipeline, adapting communication style and structure according to customer needs. • Demonstrates the ability to apply structured techniques such as qualification frameworks, objection handling



4		models, and customer segmentation tools in sales scenario development. 3. Competencies: • Is able to autonomously and collaboratively implement structured sales processes within diverse organizational structures and cross-functional teams. • Demonstrates strategic thinking in aligning sales process design with market conditions, team configuration, and organizational strategy. • Can contribute to continuous process improvement initiatives in sales organizations by leveraging both data insights and peer collaboration. • Understands and promotes a professional, ethical, and customer-oriented mindset throughout the remote selling process.
	Length of the module	25 hours of students' workflow
	Learning topics	• Sales Processes in Inside Sales: This thematic unit introduces students to the structured stages that characterize a typical inside sales workflow, from lead generation and initial contact to negotiation and deal closure. Emphasis is placed on understanding the procedural logic behind each step, while also acknowledging the need for flexibility in real-life application. Students examine how a clearly defined sales process fosters alignment between sales professionals and customer expectations, supporting both performance consistency and scalable team coordination. • Strategic Use of the Inside Sales Process: This section deepens learners' ability to interpret and apply the sales process as a strategic tool for navigating customer relationships. Students analyze techniques for managing objections, advancing conversations, and reinforcing value throughout the buyer journey. Through case examples and role-based exercises, the module underscores how effective inside sales professionals synchronize their communication and tactics with client decision-making cycles, building trust and maintaining relevance across multiple touchpoints.



6		• Cross-Selling and Up-Selling within Inside Sales: Focusing on the extension and deepening of customer relationships, this topic explores the methods and rationale behind offering complementary products or services. Students engage with models of customer needs analysis and learn how to identify appropriate moments within the sales cycle to propose additional value. The segment treats cross-selling and up-selling not merely as revenue tactics but as client-centric practices that contribute to loyalty, customization, and mutual benefit. • Managing Sales Pipelines and Digital Productivity Tools: The final area of the module introduces the technological infrastructure that underpins professional inside sales execution. Students gain familiarity with CRM platforms, scheduling tools, and pipeline tracking systems, learning how to manage leads, monitor progress, and forecast performance. Instruction focuses on how these tools support data-driven decision-making and accountability within distributed sales teams. Learners also explore the role of digital systems in enabling transparent collaboration and aligning individual tasks with strategic goals.
	Learning materials	• Video • PowerPoint presentations • Podcasts • Case studies • Articles • Books
	7 Evaluation	• Self-evaluation test

Teaching and Adaptation Guidelines

The pedagogical implementation of Module 2 must reflect its applied and process-oriented character, as well as its bridging function within the LISA learning path. Following the conceptual foundation laid in Module 1, this module introduces students to the operational mechanisms of inside sales, focusing on models of work organization, standardized sales cycles, client engagement tactics, and the use of productivity tools. It serves as the curriculum's gateway into the core practical competencies necessary for professional performance in remote sales roles. Therefore, the teaching of Module 2 should be oriented toward real-world practice while maintaining a theoretical grounding in organizational sales strategies and customer lifecycle management.



This module is designed to immerse students in the procedural logic and structural configurations of inside sales as they are implemented in various business environments. It situates the learner within professional workflows and clarifies how inside sales teams are integrated across different industries and geographical markets. Emphasis should be placed on the interdependence between well-structured sales processes, digital productivity tools (e.g., CRM systems), and performance metrics such as deal velocity, win rate, and customer lifetime value.

Synchronous Delivery

In face-to-face or live virtual settings, Module 2 should begin with a structured walkthrough of a prototypical inside sales process. Educators are encouraged to use diagrams, live CRM mock-ups, or interactive templates to help learners visualize the full cycle, from lead generation and qualification to closing and post-sale engagement. Real-world complexity should be emphasized by discussing non-linear elements of the process, such as looping through customer objections or adjusting tactics in response to buying signals.

Key multimedia assets, such as the LISA mediacasts “Sales Process in Inside Sales,” “Leveraging the Inside Sales Process,” and “Cross-selling and Up-selling”, should be used not only as explanatory tools but also as discussion catalysts. Students may be assigned to work in pairs or small teams to reconstruct the sales cycle for a given case study, such as those provided in the Module 2 case file. Instructors should facilitate dialogue around tactical decision-making, especially in relation to client needs assessment, message tailoring, and objection handling. Hands-on exercises should also involve CRM simulation, allowing students to input fictitious leads, track progress, and annotate interaction stages.

Asynchronous Delivery

Module 2 is well suited to digital, self-paced learning formats due to its sequential logic and modular content. When delivered asynchronously, the mediacasts can be embedded into an LMS platform, organized thematically to correspond to each phase of the sales process. Educators may use quizzes and reflection journals as formative assessment tools, guiding students to articulate how they would manage real client scenarios using defined steps and tools. Self-directed activities may include drafting sample sales pipelines, conducting peer reviews of sales scripts, or composing annotated sales process maps for specific industry segments.

Flexible adaptation into microlearning units is especially recommended for professional learners or part-time students. For instance, the submodules on pipeline management and up-selling techniques can be delivered independently and assessed via short project-based tasks. This supports modular credit recognition and lifelong learning strategies.

Content Localization and Institutional Integration

The structure of Module 2 allows for extensive customization to match local institutional needs and pedagogical traditions. For example, universities may tailor examples to reflect national industry profiles, such as pharmaceuticals, financial services, or software development. Guest lecturers from local firms may be invited to share real-world insights into how inside sales is executed in regional contexts. Educators are also free to adapt the workload to their academic





credit system, such as ECTS or institutional equivalents, making the module suitable for both full-semester and intensive formats.

Depending on the target group, instructors may adapt the complexity of scenarios and tools. Undergraduate students may be introduced to simplified CRM templates and pre-defined customer personas, whereas postgraduate or executive learners may engage with advanced funnel metrics or forecasting exercises. In both cases, the goal is to foster operational fluency and critical awareness of process-based decision-making in remote sales contexts.

Educational Design and Competence Orientation

Consistent with the LISA project's methodological priorities, Module 2 is built around competence-based learning outcomes. Its instructional approach should foster the ability to understand, replicate, and evaluate structured sales processes, along with the technological skills needed to manage them in virtual environments. This entails not only learning "what" the steps are, but also "why" they are organized in a particular sequence, and "how" they can be optimized through digital tools and team coordination.

The module supports digital readiness by encouraging students to work directly with productivity platforms. Moreover, it builds autonomy and self-direction, as learners must analyze how their individual contributions influence team-level outcomes. Reflection exercises should prompt students to consider trade-offs in resource allocation, customer prioritization, and channel choice.

Sustainability and Inclusion Focus

Inside sales represents a scalable and environmentally sustainable alternative to traditional sales models. Educators should underscore the role of virtual selling in reducing business travel, enabling global service coverage from local offices, and fostering inclusive hiring practices. Learners should be invited to reflect on how sales configurations impact organizational carbon footprints and accessibility. This is particularly relevant in discussions of centralized versus decentralized models.

Strategic Use in Curriculum Innovation

Module 2 lends itself well to curriculum modernization efforts aiming to embed digital workflows, data-informed decision-making, and soft skills integration within sales education. It can be deployed as part of broader efforts to develop digital commerce curricula, enterprise simulation programs, or applied business development training. Due to its structured nature, the module is also appropriate for formative assessment design, competency badge issuance, or external certification alignment.

Upon completion of Module 2, students should be able to describe key sales process stages, map organizational configurations of inside sales, apply cross-selling techniques, and operate essential productivity tools. These outcomes support progression into more collaborative (Module 3), analytical (Module 4), and technological (Module 5) domains of the LISA learning path.

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Module 3		
	Expectancy	Clarification
1	Title of the module	Inside Sales team
2	Short overview	Module 3 of the LISA curriculum centers on the interpersonal and collaborative dimensions of inside sales, positioning communication and teamwork as critical professional competences in digitally mediated sales environments. While inside sales agents may work remotely or independently, their effectiveness is fundamentally tied to their ability to operate within coordinated, often distributed, teams. This module examines how professional collaboration functions in virtual-first sales teams, with a focus on internal communication, knowledge-sharing practices, and the cultivation of a constructive team atmosphere. In particular, the module highlights the changing nature of interpersonal communication in remote contexts, where video conferencing, asynchronous messaging, and CRM-based coordination replace many face-to-face interactions. Students are introduced to both the technical and behavioral aspects of this transformation, learning how to prepare for, manage, and reflect on virtual sales conversations. Case-based content, such as “Mastering the First Client Meeting,” provides concrete examples of collaborative team work, preparing learners for role-based performance in complex, hybrid sales environments. By engaging with tools and practices relevant to inside sales teams, such as presentation protocols, internal briefings, or collaboration platforms, students gain insight into how communication, coordination, and trust contribute to sales effectiveness. The module therefore equips future professionals with not only digital fluency, but also an appreciation for team-based dynamics essential to contemporary sales organizations.





3	Expected learning outcomes	The following learning outcomes are expected in the module: 1. Knowledge: • The student understands the significance of interpersonal communication within the context of inside sales and its influence on sales effectiveness. • The student is familiar with the structural characteristics of team-based sales models, including distributed and hybrid team environments. • The student has knowledge of the key tools and practices supporting internal collaboration and communication in digitally enabled sales teams. • The student recognizes how team dynamics, internal alignment, and knowledge sharing contribute to organizational agility and customer responsiveness. 2. Skills: • The student is able to communicate professionally and effectively in remote and hybrid team contexts, using both synchronous and asynchronous tools • The student is capable of preparing and delivering sales presentations tailored to virtual meeting formats and client expectations. • The student can identify, analyze, and address communication barriers within inside sales teams, adapting strategies as necessary. • The student is proficient in using digital collaboration platforms and technologies to contribute to ongoing sales operations and joint problem-solving. 3. Competencies: • The student demonstrates openness to cultural and organizational diversity within international or cross-functional sales teams. • The student actively contributes to fostering a positive team atmosphere based on trust, respect, and shared responsibility. • The student is committed to maintaining consistent and transparent communication to support collective performance.
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4		The student values and applies inclusive practices in digital collaboration, ensuring all team members are heard and engaged.
	Length of the module	20 hours of students' workflow
5	Learning topics	Team Atmosphere and Sales Culture in Digital Environments: This section examines how team climate and group dynamics influence sales performance in remote or hybrid settings. Learners are introduced to the foundational elements of a productive team environment, mutual accountability, psychological safety, open feedback loops, and trust-based collaboration. The topic emphasizes how motivation and morale in sales teams are sustained through shared rituals, collective goals, and recognition practices. Particular attention is given to the challenges of maintaining team cohesion when operating across dispersed locations and digital platforms, as well as strategies for fostering a resilient, performance-oriented culture. Communication Practices in Inside Sales: This topic addresses the communicative infrastructure that enables inside sales teams to function effectively. Learners explore the norms, formats, and routines of internal communication, with special focus on digital-first interaction. Topics covered include asynchronous coordination, CRM-based updates, and the role of structured meetings in team alignment. Through analysis of communicative workflows, students understand how internal transparency and timely information exchange contribute directly to customer responsiveness and pipeline efficiency. The topic also highlights professional tone and clarity as critical elements in managing both client and colleague interactions. Sales Presentation Preparation and Delivery: This section focuses on the collaborative process of designing, rehearsing, and executing sales presentations. Students are guided through the team-based workflow that precedes client-facing meetings, including the internal division of roles, data integration, and storytelling alignment. The content



6		also explores strategies for tailoring messages to specific audience profiles and delivering them via digital platforms. Presentation skills are framed not as isolated competencies, but as the culmination of internal collaboration, preparation discipline, and shared understanding of the customer journey. • Digital Collaboration Systems and Workflow Coordination: The final topic introduces the digital ecosystem that supports distributed sales teams. Learners become familiar with collaborative platforms such as CRM-integrated dashboards, internal messaging tools, and cloud-based content sharing environments. The focus lies not merely on tool functionality, but on how these systems embed transparency, accountability, and efficiency into the daily operations of inside sales teams. Practical examples are used to demonstrate how workflows are coordinated, performance is tracked, and knowledge is shared across geographically and functionally diverse teams. This topic reinforces the link between technical fluency and operational excellence in contemporary sales settings.
	Learning materials	• Video • Podcasts • Case study • Articles • Books
	7 Evaluation	• Self-evaluation test

Teaching and Adaptation Guidelines - Module 3

The pedagogical implementation of Module 3 must emphasize the social, communicative, and technological dimensions of inside sales as an organizational function. Building on the operational insights introduced in Module 2, this module shifts focus to the interpersonal and collaborative competencies required for success in digital sales environments. It is designed to help students understand the critical role of internal communication, teamwork, and cross-functional coordination within dispersed, hybrid, or fully remote sales teams. Accordingly, teaching should reflect both the strategic importance of intra-organizational alignment and the practical demands of virtual collaboration.

This module introduces students to the culture and structures of teamwork in inside sales, highlighting the professional expectations placed on individual contributors operating within fast-paced, target-driven environments. It also provides foundational instruction in remote



communication, presentation delivery, and the use of sales enablement technologies that facilitate team interaction. As such, Module 3 serves as a pedagogical bridge into both the social infrastructure and digital competencies of modern sales organizations.

Synchronous Delivery

In face-to-face or synchronous virtual settings, instructors are encouraged to begin with a thematic overview of team dynamics in remote sales environments. Case-based teaching should be prioritized, drawing from the real-life materials provided within the LISA project, such as the mediacasts “Improve Team Communication in Inside Sales” and “Building Team Atmosphere”, as well as the case study “Mastering the First Client Meeting.” These should serve as the basis for guided discussions, simulations, and peer evaluation exercises.

Teaching activities may include structured role-plays simulating sales team interactions (e.g., peer coaching, stand-up meetings, or strategy sessions), as well as analysis of communication failures or successes drawn from practical scenarios. Particular emphasis should be placed on giving and receiving feedback, managing conflict, and aligning communication strategies with sales goals. Instructors should also encourage reflective practice on the emotional and psychological dimensions of sales teamwork, especially under performance pressure.

Group assignments may involve preparing a collaborative pitch deck or co-developing a communication protocol for a fictional remote sales team. These tasks help students understand how internal alignment enhances customer-facing performance.

Asynchronous Delivery

For asynchronous or blended delivery, Module 3 is well suited to modular digital formats. The mediacasts included in the LISA platform https://lisaplatform.saleseducation.eu/login.php?client_id=lisapri should be used as core multimedia inputs, supported by short quizzes, written reflections, and online forums dedicated to team-based problem solving. Educators are advised to assign collaborative projects using digital workspaces (e.g., Google Docs, Microsoft Teams) to simulate real-life sales coordination tasks.

Students may be asked to co-create best-practice guides for internal communication, analyze digital tools used in team collaboration, or conduct peer reviews of recorded virtual presentations. Instructors can use formative assessment tools to track individual contributions to group tasks and provide feedback on communication quality and collaborative behaviour.

Where student profiles include professionals or part-time learners, Module 3 can be adapted into self-paced microlearning clusters focused on specific subtopics (e.g., “Presentation Skills in Remote Sales,” “Digital Tools for Teamwork,” “Communicating Across Departments”).

Content Localization and Institutional Integration

The flexibility of Module 3 allows for seamless adaptation to local institutional contexts. Universities may incorporate company-specific case studies or invite guest speakers with experience in leading virtual sales teams. Institutions offering business communication or organizational behaviour courses may integrate this module into broader curricula, with emphasis tailored accordingly.

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Academic credit assignment and scheduling can follow local standards (e.g., ECTS integration) without altering the content framework. Adaptation may also consider national pedagogical norms regarding teamwork and peer evaluation. For example, in systems where individual assessment predominates, educators may need to scaffold teamwork skills more deliberately.

Educational Design and Competence Orientation

The instructional design of Module 3 is rooted in the LISA project's focus on competence-based learning. It aims to develop both hard and soft skills, ensuring that students not only understand the theory behind effective team collaboration but can also demonstrate practical abilities in applying it.

Instruction should facilitate critical understanding of:

- Communication protocols in remote/hybrid teams.
- Presentation strategies tailored to virtual sales contexts.
- Digital tools that enable internal coordination (e.g., Slack, CRM chat integrations, shared playbooks).
- The influence of team atmosphere and psychological safety on performance outcomes

Learners should be regularly asked to reflect on their own communication styles, adaptability in team settings, and ability to maintain motivation in distributed environments.

Sustainability and Inclusion Focus

Educators should explicitly discuss the social and environmental implications of collaborative inside sales models. Topics such as digital inclusion, accessibility of remote work, and the environmental benefits of reduced travel should be integrated into case discussions and reflection activities.

Inside sales, as taught in this module, promotes inclusive participation in the workforce and offers scalable models of collaboration that reduce operational carbon footprints. Teaching should address how well-designed team processes can enable equitable participation and performance monitoring in digital-first organizations.

Strategic Use in Curriculum Innovation

Module 3 provides a foundation for curricular innovation in the areas of remote work readiness, team dynamics, and virtual collaboration. It can be integrated into academic programs in sales, digital business, or human resource management, and supports the development of transversal skills that are increasingly demanded by employers.

Given its strong orientation toward interpersonal skills and digital fluency, this module is particularly suitable for competency certification and skill badge issuance, whether as part of a 5 ECTS course or a stand-alone training package.



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Module 4		
	Expectancy	Clarification
1	Title of the module	Sales analytics
2	Short overview	Module 4 introduces learners to the central role of data in modern inside sales operations. As digital platforms increasingly shape the daily activities of remote sales professionals, data is no longer just a record of past transactions, it becomes a strategic asset that drives decision-making, performance optimization, and customer engagement. This module explores how inside sales teams use structured data to plan, act, and improve their commercial outcomes. Learners are guided through key concepts such as sales analytics, key performance indicators (KPIs), and data visualization, examining how information flows through sales processes and how it can be transformed into actionable insights. The content highlights that being data-literate is not about mastering technical software, but about developing the ability to read, interpret, and use information meaningfully. Real-world examples and tools demonstrate how sales professionals track pipeline progress, monitor campaign effectiveness, evaluate client potential, and adapt strategies in real time. Importantly, Module 4 emphasizes how data enables personalized client interactions, collaborative teamwork, and agile adaptation to shifting market dynamics. By building competencies in data collection, performance tracking, and visual reporting, learners become prepared to contribute to results-driven, insight-oriented sales environments. This module aligns with LISA's broader goals of digital readiness, remote-first professionalism, and sustainable business practices grounded in informed action.
3	Expected learning outcomes	The following learning outcomes are expected in the module: 1. Knowledge:



	• The student understands the strategic role of data in inside sales operations, including how digital transformation reshapes sales performance monitoring and customer engagement. • The student is familiar with the main types of sales data (quantitative and qualitative) generated across the inside sales cycle, and recognizes their relevance for decision-making and team coordination. • The student comprehends key principles of data governance, including data accuracy, consistency, privacy, and ethical use in sales contexts. • The student has knowledge of essential analytical tools and platforms (such as CRM systems, dashboards, and data visualization software) and their application to sales intelligence. 2. Skills: • The student is able to identify, collect, and organize relevant sales data from various digital sources, including CRM databases and performance monitoring tools. • The student is capable of interpreting data visualizations (charts, dashboards, pipeline indicators) and translating these into actionable recommendations for sales activities. • The student can critically evaluate sales KPIs and apply them to assess sales performance, optimize workflows, and support client segmentation strategies. • The student can use digital tools to communicate insights effectively within a team, supporting collaborative planning and adaptive decision-making. 3. Competencies: • The student demonstrates the ability to work autonomously and collaboratively in data-informed inside sales environments, contributing to results-oriented team performance. • The student is capable of integrating data literacy into daily professional routines, ensuring alignment with organizational goals and evidence-based practices. • The student exhibits an ethical and critical approach to handling customer and sales data, respecting principles
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4		of transparency, data protection, and responsible innovation. The student appreciates the significance of business intelligence in shaping agile, customer-centric sales strategies, and is prepared to contribute to continuous improvement through the use of data.
	Length of the module	25 hours of students' workflow
	5 Learning topics	Data Visualization, Structure, and Governance in Inside Sales: This component introduces students to the fundamental principles of managing structured sales data in digital environments. Particular emphasis is placed on how customer and performance data are stored, organized, and maintained within CRM ecosystems. The topic covers issues of data integrity, consistency, and compliance, including considerations around GDPR and ethical data use in commercial contexts. Students also develop practical competence in the creation and interpretation of visual representations, such as dashboards, conversion funnels, and KPI matrices, that support decision-making in sales teams. Instructional scenarios may involve dashboard simulations or comparative analysis of real-world sales metrics. Sales Technologies in Operational Practice: This topic provides a functional overview of the technological systems that underpin remote selling in modern business-to-business contexts. Students become familiar with the core architecture and practical use cases of platforms such as CRM systems, lead scoring algorithms, workflow automation tools, and sales analytics modules. The focus is not only on tool operation but also on integration: how technologies interconnect within a distributed team and how their correct application increases efficiency, accountability, and client responsiveness. Drawing on mediacasts and digital learning materials, students examine how technological infrastructures shape both individual performance and organizational alignment. Strategic Use of Sales Business Intelligence: The final theme addresses business intelligence (BI) as a strategic competence within inside sales. Students explore how



6		systematically collected and interpreted data supports customer segmentation, forecasting, pipeline optimization, and long-term account development. Case materials such as the Strato Automotive and EGN examples are used to demonstrate how advanced data analysis informs commercial strategy across departments. The topic also introduces predictive and diagnostic approaches to sales analytics, including basic exposure to trend analysis and scenario modeling. Students are encouraged to reflect on the interrelation between sales, marketing, and product development, and the role of sales data in guiding business innovation.
	Learning materials	• Video • Podcasts • Case studies • Articles • Books
	7 Evaluation	• Self-evaluation test

Teaching and Adaptation Guidelines - Module 4

The pedagogical implementation of Module 4 must emphasize the integration of data-driven thinking into sales education. As a continuation of the LISA learning path, this module introduces students to the analytical and technological foundations of modern inside sales, focusing on how structured data, sales technologies, and business intelligence tools are used to inform decisions, personalize customer engagement, and improve operational efficiency. In doing so, Module 4 contributes to the development of digitally fluent sales professionals capable of operating in high-data, remote-first environments.

This module equips students with both the conceptual understanding and technical literacy required to navigate contemporary sales systems. Teaching should highlight how data is not merely collected, but curated, interpreted, and transformed into actionable insight. It is essential to show how these competencies underpin the broader goals of inside sales: responsiveness, customer-centricity, and organizational alignment. The instructional focus must also remain sensitive to the challenges of data governance, platform interoperability, and ethical responsibility in commercial data usage.

Synchronous Delivery

In synchronous classroom or virtual sessions, teaching should begin with a structured exploration of the role data plays in remote sales contexts. Educators are encouraged to use real-world dashboards, CRM mock-ups, and analytical templates to demonstrate how raw data becomes a resource for insight and performance control. Emphasis should be placed on the interpretation of



data within the workflow of inside sales, not as a separate analytical task but as an embedded component of everyday decision-making

LISA multimedia assets such as “Mastering Data Collection in Inside Sales,” “Inside Sales Business Intelligence,” and “Data Visualization” should serve as instructional anchors. These can be followed by instructor-led walkthroughs or group exercises using simulated datasets. Students might collaboratively develop dashboards, analyze pipeline reports, or identify performance bottlenecks using predefined KPIs.

Case study discussions, particularly from the Strato Automotive and EGN scenarios, are strongly recommended. These materials help illustrate the link between data literacy and commercial impact, highlighting how predictive analytics, performance metrics, and digital reporting shape strategic priorities in sales organizations.

Asynchronous Delivery

Module 4 is well suited for asynchronous learning formats, with content organized into logically progressive units that mirror the sales analytics workflow. Educators should deploy multimedia lessons via institutional LMS platforms, augmented by interactive quizzes, data interpretation tasks, and peer-reviewed assignments.

Students can be tasked with building basic dashboard models, developing visual reports from structured CRM data, or completing digital storytelling exercises using anonymized sales performance metrics. Practical exercises may include data audits, KPI definition assignments, or short reflections on the ethical use of customer data in commercial settings.

Where appropriate, asynchronous content may be modularized for microlearning pathways, targeting professionals engaged in upskilling or continuing education. These clusters can focus on discrete areas such as “CRM Data Management,” “Sales Performance Metrics,” or “BI Tools for Remote Sales.”

Content Localization and Institutional Integration

The instructional design of Module 4 allows for integration into diverse academic programs across undergraduate and postgraduate levels. Local adaptation is encouraged through the inclusion of regionally specific case studies, company data, or market trends, particularly those reflecting the state of digital transformation in national contexts.

Institutions may align the module with existing business intelligence, digital marketing, or data science curricula. Guest speakers from the technology or sales analytics sector may be invited to provide practical insights into the application of CRM systems and BI platforms. Additionally, the module may be tailored to the constraints of local credit systems and assessment traditions, while preserving its learning objectives and structure.

Educational Design and Competence Orientation

Consistent with the LISA project’s commitment to competence-based education, Module 4 is structured to build digital and analytical fluency. Students should not only acquire theoretical knowledge of data systems but also demonstrate their ability to interpret, visualize, and apply that data within the sales process.

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Instruction should develop the following capacities:

- Interpreting sales dashboards, KPIs, and client data histories.
- Utilizing CRM and sales automation platforms to structure daily workflows.
- Identifying actionable insights from sales trends and customer behaviours.
- Applying BI insights to optimize sales strategies and cross-functional alignment.

Assignments should consistently link these competencies to real-world performance goals, encouraging students to consider how digital infrastructure supports team coordination, client engagement, and strategic decision-making.

Sustainability and Inclusion Focus

Educators are advised to explore how data and analytics contribute to more sustainable and inclusive sales operations. Topics may include the environmental benefits of virtual sales infrastructure, the equitable use of digital tools, and the role of data in identifying underserved customer segments.

Students should be encouraged to reflect on the ethical dimensions of sales analytics: the importance of data protection, algorithmic fairness, and transparent communication with clients. These considerations are vital for shaping responsible professionals who can navigate the tensions between commercial efficiency and social accountability.

Strategic Use in Curriculum Innovation

Module 4 offers fertile ground for curricular renewal in the areas of digital sales education, business analytics, and applied data science. It may serve as a testing module for simulation-based teaching, dashboard-driven assessment, or competency-based credentialing.

Its modularity, multimedia support, and real-world relevance make it particularly suitable for blended learning formats and professional certification programs. Whether integrated into a traditional degree program or offered as a standalone course, this module equips learners with the analytical skills and digital awareness required to thrive in today's data-driven sales environment.



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Module 5		
	Expectancy	Clarification
1	Title of the module	Data insights
2	Short overview	Module 5 focuses on the technological foundations of contemporary inside sales practice. As digital tools, platforms, and AI solutions increasingly define how sales work is performed, this module equips students with a working understanding of how technology supports and transforms sales productivity, coordination, and customer engagement. Learners are introduced to widely used sales technologies, ranging from CRM systems to AI-driven analytics, and explore how these are embedded in everyday workflows. The module emphasizes both the functional and human dimensions of tech adoption: not only how tools optimize sales tasks, but also how they facilitate team collaboration, enhance communication, and support decision-making in remote and hybrid environments. By engaging with real tools and case-based scenarios, students develop essential digital fluency for working effectively in technology-intensive inside sales roles.
3	Expected learning outcomes	The following learning outcomes are expected in the module: 1. Knowledge: • The student demonstrates understanding of the technological landscape shaping modern inside sales, including CRM systems, AI-based analytics platforms, and sales automation tools. • The student understands how digital infrastructure supports remote sales processes, collaboration, customer relationship management, and data-driven decision-making. • The student is familiar with the key functionalities and strategic implications of SalesTech ecosystems within business-to-business (B2B) environments. 2. Skills:





4		• The student is able to navigate and apply CRM systems, productivity platforms, and digital communication tools to perform standard inside sales tasks (e.g., lead tracking, customer profiling, pipeline management). • The student can interpret sales data visualizations and use technology to inform actions across the sales cycle, including client interaction, reporting, and performance monitoring. • The student is capable of selecting and combining appropriate tools to support coordination, transparency, and responsiveness in hybrid or remote team settings. 3. Competencies: • The student can integrate digital tools into individual and team-based sales workflows with autonomy and critical awareness of their operational impact. • The student is able to adapt to evolving digital environments, demonstrating readiness for continuous learning in the face of rapid technological change. • The student recognizes the ethical and organizational implications of data use and automation in sales, including issues of transparency, accountability, and inclusion in remote-first business models. • The student appreciates the significance of business intelligence in shaping agile, customer-centric sales strategies, and is prepared to contribute to continuous improvement through the use of data.
	Length of the module	25 hours of students' workflow
	Learning topics	• The Role of Data in Inside Sales: This topic introduces students to the central role that data plays in shaping sales strategy and execution. Far beyond retrospective reporting, data is presented as an active input into customer segmentation, lead prioritization, personalization strategies, and sales forecasting. Learners engage with examples that demonstrate how sales professionals interpret buyer behavior, monitor key performance indicators, and act on real-time insights from dashboards and sales platforms. The section also includes critical reflection on ethical



	considerations and the limitations of excessive reliance on quantitative indicators. • Data Collection, Literacy, Governance, and Analytics: Students are introduced to the operational and ethical frameworks surrounding the collection, management, and interpretation of sales data. This includes core principles of data quality, accessibility, and consistency, as well as regulatory considerations such as GDPR compliance and secure handling of customer information. Through guided exercises and media-supported learning, learners develop the capacity to read, interpret, and question sales data with precision and critical awareness. The section also cultivates familiarity with governance practices in increasingly data-intensive and remote-first work environments. • Sales Technologies, CRMs, and AI Tools for Data Analysis: This section provides learners with a structured overview of the key digital tools used in inside sales, with an emphasis on customer relationship management systems, sales enablement software, and AI-driven analytics platforms. Students examine how these technologies are used to manage sales pipelines, automate routine tasks, and support personalized communication. Rather than focusing on tool-specific training, the emphasis is on developing adaptive users who understand the strategic function of tools like lead scoring, intelligent email automation, predictive analytics, and conversational AI within modern sales workflows. • Collaboration and Communication Within the Team: In this final topic, the focus shifts to the role of digital platforms in supporting internal communication, coordination, and shared visibility across dispersed sales teams. Students explore how collaborative technologies, ranging from integrated CRMs and project boards to messaging platforms and shared dashboards, enable real-time knowledge exchange, transparent reporting, and functional alignment across departments. Special attention is given to the dynamics of hybrid and remote teams, including strategies for
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6		maintaining cohesion, accountability, and collective ownership in digital-first organizational settings.
	Learning materials	• Video • Podcasts • Case studies • Articles • Books
7	Evaluation	• Self-evaluation test

Teaching and Adaptation Guidelines - Module 5

The pedagogical delivery of Module 5 should focus on the technological infrastructure that underpins modern inside sales practices. As the culmination of the LISA learning path, this module synthesizes previous competencies, conceptual, procedural, interpersonal, and analytical, by positioning digital fluency as a core requirement for effective participation in remote sales roles. It provides students with both the strategic perspective and practical understanding needed to navigate the software ecosystems, AI tools, and collaborative platforms that define contemporary inside sales operations.

Students are introduced to the role of technology not simply as an enabler of individual productivity, but as a structural component of communication, coordination, and decision-making in distributed teams. The teaching approach should convey how digital systems influence sales behaviour, performance tracking, and customer interaction. At the same time, the module must critically address the human implications of sales technologies, including questions of accessibility, digital competence, and ethical use.

Synchronous Delivery

In instructor-led settings, teaching should begin with a structured overview of the most prevalent tools used in inside sales: CRM platforms, workflow automation systems, communication hubs, and AI-based analytics applications. Educators may employ live tool demonstrations, walkthroughs of interface functionality, or collaborative platform simulations to familiarize students with system logic and use cases. The LISA media resources, including “Sales Technologies, CRMs and AI Tools for Data Analysis” and “Inside Sales Team Management: Collaboration & Coordination Tools”, should serve as key instructional inputs.

Learning sessions can include role-based simulations in which students assume the positions of sales reps, analysts, or managers using dashboards and collaboration platforms to coordinate tasks, interpret data, and respond to performance signals. Emphasis should be placed on how these tools are embedded in daily workflows, not as isolated technologies but as integral supports for decision-making, team alignment, and customer engagement.





Case materials and extra readings, such as those related to AI-enhanced sales planning or platform integration strategies, should be used to frame group discussions around topics like tool interoperability, productivity gains, and the risks of automation bias or technological over-dependence.

Asynchronous Delivery

Module 5 is well suited for asynchronous and blended learning environments. In this format, teaching content can be segmented into topical clusters, each focused on a distinct component of sales technology. Students may complete media-supported lessons, interface walkthroughs, or virtual tool tutorials at their own pace. Assignments should focus on applied digital literacy, for example, navigating a CRM interface, simulating a sales automation workflow, or comparing platform features based on organizational needs.

Self-directed tasks may include the development of a technology integration plan for a fictional sales team, reflection pieces on digital collaboration practices, or critical assessments of AI-based decision tools. Educators can assess student engagement through quizzes, video presentations, or annotated tool reviews. Peer-to-peer feedback in shared digital spaces may be used to simulate real-time collaborative environments.

For working professionals or part-time learners, modular adaptation into short-form units is recommended. These may focus on platform evaluation, CRM data usage, or communication tool selection and can be mapped to digital skills frameworks relevant for industry certification or lifelong learning recognition.

Content Localization and Institutional Integration

The content structure of Module 5 supports extensive localization and institutional flexibility. Educators may incorporate nationally preferred platforms or region-specific examples of digital sales transformation. For example, universities may integrate guest lectures from local SaaS providers or technology consultants, or embed the module into broader programs in digital marketing, sales engineering, or organizational IT systems.

Institutional adaptation may also include aligning workload and assessment methods with local academic calendars and credit systems. Depending on curricular context, the module can be used as a capstone project in applied digital commerce programs or as a specialization module in executive training.

Educational Design and Competence Orientation

In alignment with the LISA project's pedagogical principles, Module 5 is competence-based and designed to build applied technological literacy in real-world contexts. Students should be guided toward not only using digital systems effectively, but also understanding their strategic implications, usability challenges, and impact on professional behaviour in sales environments.

Instructional focus should aim to develop the following learner capacities:

- Fluency in using CRM systems and collaborative platforms for sales execution and coordination.

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- Critical understanding of automation tools and AI-based analytics within the sales workflow.
- Ability to evaluate and compare sales technologies in terms of usability, integration, and strategic fit.
- Reflection on the human implications of digital infrastructure, collaboration dynamics, inclusion, and ethical considerations.

Assessment tasks should consistently bridge digital tool use with broader team and organizational outcomes, encouraging students to position themselves as adaptive, reflective, and responsible technology users.

Sustainability and Inclusion Focus

Educators should emphasize how digital platforms in inside sales contribute to environmental sustainability, minimizing travel, optimizing communication, and reducing operational redundancy. At the same time, the module offers a space to address inclusion challenges associated with technological transformation, including digital literacy gaps, access to tools, and equitable participation in remote work environments.

Students should be encouraged to reflect on how thoughtful tool selection and inclusive digital practices can contribute to more accessible and responsible business models.

Strategic Use in Curriculum Innovation

Module 5 provides a robust platform for innovation in sales education, particularly in the area of digital transformation and technology-enabled teamwork. It is especially relevant for programs aiming to integrate CRM training, sales automation skills, or platform-specific credentials (e.g., Salesforce, HubSpot) into their offerings.

Its modularity and strong alignment with industry practice make it suitable for use in hybrid or flipped-classroom formats, as well as professional certification and upskilling programs. As the final stage in the LISA learning path, the module not only prepares students for technology-rich work environments, but also reinforces the interdisciplinary, collaborative, and digitally informed mindset necessary for sustainable career development in inside sales.



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2. Adaptation guidelines

2.1. Possible customisation

Customizing the LISA Programme for National and Institutional Contexts

The LISA training framework is intentionally designed to be modular, flexible, and scalable, making it adaptable to a wide variety of educational systems, national training priorities, and institutional structures. While the pedagogical core of the programme is rooted in competence-based, digitally supported instruction, its practical delivery must be calibrated to reflect the specific needs, traditions, and capabilities of different learning environments. Customization is not an afterthought but an integral part of the LISA implementation strategy, enabling alignment with local labour markets, academic calendars, technological infrastructure, and cultural learning norms.

Adapting to National Education Frameworks

Across Europe and beyond, higher education systems differ in how they define learning outcomes, structure qualifications, and award academic credit. The LISA programme, mapped broadly to EQF levels 6 and 7, must be translated into these national frameworks, such as ECTS-based degree systems, vocational qualification models, or continuing education programmes.

For example, in countries where sales is traditionally embedded within broader business or marketing degrees, LISA modules may be introduced as elective courses or specialisation pathways. In dual education systems (e.g., Germany, Austria, Switzerland), integration may occur through partnerships with vocational academies or employer training centres, with stronger emphasis on applied tasks and workplace relevance. In contrast, countries with competency-based TVET frameworks (e.g., Finland, the Netherlands) may focus more on skill demonstration and assessment alignment, using LISA content as part of professional certification routes.

The language of delivery is another dimension requiring careful adaptation. While much of the LISA content is developed in English, national rollouts may require translation of mediacasts, assignment guidelines, and LMS interfaces. This includes not only linguistic translation but cultural localisation, ensuring that examples, names, industries, and communication styles are relatable to the learners' context. In some cases, institutions may prefer to blend English and national language materials to both maintain internationalisation goals and support learner comprehension.

Institutional Integration Strategies

Institutional variation is equally significant. Universities, applied sciences institutions, business schools, vocational training providers, and corporate academies all possess differing levels of





curricular flexibility, teaching resources, and digital infrastructure. The LISA modules can be adapted accordingly.

In traditional universities with semester-based structures, LISA modules may be taught sequentially across a 12-15 week term. Here, integration might involve embedding the content into existing business, management, or entrepreneurship programmes, with the modules delivered as standalone courses (e.g., “Digital Sales Strategy”) or as part of a capstone series. In such settings, emphasis may be placed on theoretical grounding, critical reflection, and research-oriented assignments.

By contrast, applied universities or executive education centres may opt for intensive block teaching formats. For instance, Modules 2 and 4 could be delivered as part of a one-week bootcamp on “Sales Operations and Data Fluency,” supported by pre-session readings and post-session assessments. These institutions often prioritise case-based learning, real-world simulations, and guest lectures from industry professionals. LISA’s multimedia library, case studies, and practical exercises are well suited to this delivery model.

Smaller colleges or training providers with limited access to sales technology platforms may need to adapt the technical components. For example, if commercial CRM systems are not available, educators might simulate CRM environments using spreadsheets or open-source tools. Instructors can supplement missing software with walkthrough videos, role-plays, or paper-based exercises that replicate sales processes and analytics interpretation.

Aligning with Local Labour Markets and Industries

Another important axis of customization is labour market orientation. Different countries and regions have varying levels of inside sales maturity, sectoral demand, and workforce readiness. LISA’s structure allows for contextual adaptation to these realities.

Institutions may choose to emphasise industry segments where inside sales are growing rapidly in their region, such as SaaS companies, advanced manufacturing, healthcare technology, or financial services. Guest speakers, assignments, and case studies can be tailored accordingly. For instance, a university in a region with a strong medtech sector might use Module 3 to focus on team-based sales collaboration in regulated environments, while an institution in a startup ecosystem may highlight agility, CRM automation, and growth metrics.

Work-based learning options such as internships, job-shadowing, or applied group projects with local firms can be integrated as additional learning components. Instructors may assign students to map the sales workflows of real companies, interview sales professionals, or co-create sales playbooks in partnership with SMEs.

Cultural and Pedagogical Sensitivity

Finally, pedagogical traditions and classroom cultures vary widely, and adaptation must be sensitive to learners’ expectations and habits. In some contexts, active participation, peer feedback, and open critique are encouraged from early stages of education; in others, learning may be more instructor-led, hierarchical, or exam-oriented. The LISA modules include interactive exercises, group assignments, and reflective components that may require adaptation in tone, format, or assessment weighting.

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For example, in countries where individual assessment predominates, teamwork components might be supported with rubrics that explicitly assess individual contributions. Alternatively, self-assessment tools and guided peer feedback can be scaffolded with more detailed instructions. In cultures where students may hesitate to critique peers or ask questions, instructors can use anonymous online tools (e.g., polling, quiz platforms) to promote engagement. Educators should also consider the digital readiness of learners. In settings where LMS use or asynchronous learning is relatively new, technical onboarding may be required. Tutorials, help desks, and introductory videos can help ensure that the flexibility offered by LISA does not become a barrier to participation.

Conclusion

The strength of the LISA programme lies not only in its content, but in its adaptability. By allowing for variation in format, focus, assessment, and language, it can support a wide range of institutional missions, from academic degree programmes to targeted workforce upskilling. Effective customization depends on close alignment with local educational structures, industry needs, and learner profiles, while preserving the programme's core aims: to foster digitally fluent, collaborative, and data-aware sales professionals capable of thriving in evolving market conditions.

2.2. Range of flexibility

Flexibility in Terms of Tools, Scheduling, and Credit Allocation in the LISA Training Programme

A core strength of the LISA (Learning Inside Sales Academy) training programme lies in its intentional flexibility across several dimensions of implementation: the tools used for delivery and practice, the scheduling models that govern its deployment, and the credit allocation frameworks into which it can be embedded. This flexibility ensures that the programme can be meaningfully adopted across a diverse landscape of educational institutions, training formats, and national systems, without compromising pedagogical integrity or competence orientation.

Technological Flexibility: Tools and Learning Platforms

The LISA programme is designed to be technologically agnostic, meaning that it does not depend on a single software environment or proprietary platform. While it makes extensive use of digital tools, especially in the areas of CRM systems, sales data management, virtual communication, and team collaboration, it does so in a modular and scalable way. This allows institutions to substitute, augment, or simulate tools based on their own digital infrastructure and resource availability. For example, the teaching of Modules 2 and 5 may involve direct use of CRM systems to simulate sales pipelines or input customer data. In well-equipped institutions, this may include access to platforms such as Salesforce, HubSpot, or Pipedrive. However, where access to such commercial tools is limited, instructors can replicate these learning experiences using Excel templates, open-source CRMs, or case-based walkthroughs with annotated screenshots. Similarly, virtual

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meeting platforms (e.g., Zoom, MS Teams, Google Meet) used in communication exercises can be adjusted to align with institutional licenses or student familiarity.

The flexibility in tool use also extends to the learner side. All LISA media content is compatible across standard learning management systems (LMS), mobile devices, and browsers. Closed captions, multilingual support, and downloadable slides make it accessible in both high- and low-connectivity environments. This design ensures that students in hybrid, remote, or asynchronous formats receive an equivalent learning experience. The programme thus supports both high-end technical integration and low-bandwidth adaptations, depending on context.

Scheduling Flexibility: Duration and Course Structuring

The LISA curriculum is structured around five modules, each of which can function as a discrete learning unit or as part of a comprehensive course. The default model assumes a full-semester course lasting 12 to 14 weeks, suitable for integration into undergraduate or graduate degree programmes. However, the content is highly modular, allowing institutions to redesign the pacing and delivery according to their pedagogical calendars and learner needs.

A standard academic implementation might allocate 2-3 weeks per module, with a recommended balance between synchronous and asynchronous instruction. For instance, Module 4 (focused on Sales Analytics) may require additional instructional time due to its technical content and group assignments, while Modules 1 and 3, covering foundational knowledge and communication dynamics, can be delivered more compactly. This format works well within semester-long programmes and allows for assessment periods, project work, and review sessions.

Alternatively, the modules can be deployed in block teaching formats, executive short courses, or professional upskilling programmes. In such contexts, institutions might offer LISA content over an intensive 1-2-week schedule, dedicating a full day or multiple consecutive half-days per module. This approach suits learners seeking condensed, high-impact training, such as career changers, corporate trainees, or postgraduate business students. The programme's internal coherence and structured progression (from conceptual foundations to tool mastery) support flexible sequencing, even in compressed timelines.

Self-paced online delivery is equally feasible. Each module includes video mediacasts, readings, assignments, and quizzes that can be organized into a weekly learning path or adapted into microlearning clusters. Learners can work through modules at their own speed, provided that institutions support this with regular check-ins, discussion forums, or reflective tasks. For instance, a part-time learner may complete Module 2 over three weeks while balancing employment and family obligations. The content remains intact, but the temporal structure adapts to learner autonomy.

Credit Allocation: ECTS and Institutional Recognition

The LISA programme is aligned with a 5 ECTS workload, reflecting approximately 125 hours of total learning time. This includes instructional contact hours, readings, assignments, group work, and assessment preparation. Such a workload is compatible with a wide range of academic and vocational programmes across Europe and conforms to Bologna Process expectations.





Within degree programmes, LISA may be offered as a standalone elective (e.g., “Digital Sales Competencies”), as part of a minor in sales, or as a component of broader business modules. Universities can formally integrate it by assigning 5 ECTS credits to the complete course or by mapping individual modules to smaller credit units, for instance, 1 ECTS per module plus a final project. Institutions may also choose to embed the content within existing curricular offerings, redistributing hours and assessments across other units such as Marketing, CRM Management, or Business Analytics.

Vocational and executive programmes may use alternative models of recognition, such as digital credentials, certificates of completion, or micro-credentials linked to national qualification frameworks. LISA’s modularity makes it well-suited to stackable learning: students who complete specific modules may earn badges in “CRM and Pipeline Management” or “Virtual Sales Communication,” which can later be aggregated into a full qualification. This approach supports flexible learning paths, especially for adult learners, professionals in transition, or those seeking to specialize in sales technology or remote client engagement.

Crucially, the adaptation manual provides clear guidance for workload estimation, assessment mapping, and credit equivalency, allowing instructors and curriculum designers to align LISA with institutional policies. Whether delivered as part of an undergraduate degree, an executive workshop, or a certified training package, the programme’s architecture supports rigorous, flexible, and formally recognized implementation.

Conclusion

Flexibility in tools, scheduling, and credit design is essential for the success of LISA across diverse learning environments. By avoiding rigid dependencies, on specific platforms, timeframes, or assessment models, the programme empowers educators and institutions to adapt its delivery to their specific operational realities. Whether deployed in a traditional university classroom, a professional development seminar, or a self-paced online course, LISA maintains its relevance and impact through this built-in adaptability. This ensures not only broad applicability but also pedagogical coherence in a rapidly changing educational and sales landscape.





3. Practical implementation guidance

This chapter provides concrete guidance on how to translate the LISA (Learning Inside Sales Academy) programme into real teaching and training practice. It is written for programme coordinators, university lecturers, vocational trainers, and instructional designers who wish to integrate LISA into existing curricula or develop new offerings around it.

The chapter is structured around three detailed implementation scenarios:

- a 12-week, 5 ECTS bachelor-level course in business administration;
- a three-week executive training format for working professionals; and
- a fully asynchronous 10-week online course for distance learners.

Each scenario describes the target learner profile, delivery format, and a step-by-step learning path, including examples of activities, assessments, and use of the LISA modules and mediacasts. These are not prescriptive blueprints, but adaptable templates that institutions can scale up or down depending on their own calendars, resources, and strategic priorities.

The final section of the chapter complements the scenarios with technical and organizational advice. It summarizes key requirements for digital infrastructure, staffing and team teaching, local syllabus integration, and continuous improvement. Taken together, the scenarios and the technical guidance are designed to help institutions implement LISA in a way that is both pedagogically robust and operationally feasible, ensuring that learners acquire future-oriented inside sales competences in a digitally enabled environment.

3.1.Scenario 1 - 12-Week Bachelor-Level Course (5 ECTS)

At a European university offering a Bachelor's degree in Business Administration, the LISA programme is integrated as a 5 ECTS elective in the fifth semester. The course runs for 12 weeks, combining face-to-face lectures with asynchronous digital assignments. The aim is to provide students with theoretical grounding, practical simulations, and competence-oriented feedback using the full five-module LISA framework. Instruction is led by a single coordinator with support from guest practitioners during selected weeks.

Week-by-Week Implementation Plan

Week 1 - Course Introduction and Module 1 Kick-off

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Students are introduced to the learning outcomes and structure of the LISA programme. The first session includes an introductory lecture on the evolution of inside sales, supported by the LISA mediacast “What Is Inside Sales Today?”. A class discussion follows, focusing on regional developments in remote work, digital sales, and the service economy. Students are assigned a short reflection on their own experiences with online buying or sales.

Week 2 - Completing Module 1: Inside Sales as a Field

This week focuses on client behavior in remote channels and the core competencies of inside sales representatives. Students engage in a case-based analysis of a company transitioning from traditional to remote sales. A short group presentation requires them to identify key organizational adjustments. This sets the stage for exploring workflows in Module 2.

Week 3 - Module 2: Sales Process and Organizational Structure

Using templates and visuals from the LISA manual, students are introduced to the structure of a standard inside sales cycle. Working in groups, they create process maps for different customer types (e.g., B2B vs. B2C), using CRM mock-ups. The exercise concludes with a gallery walk where each group presents its cycle and discusses deviations from the standard flow.

Week 4 - Leveraging Sales Processes and Tools

This session centers on strategic use of sales stages, qualifying leads, managing objections, and value messaging. Students perform a role-play based on a client interaction scenario from the LISA case set, with feedback from peers and the instructor. A short digital assignment asks students to update lead information in a simulated CRM sheet and explain their decisions in writing.

Week 5 - Module 2 Continuation: Cross-Selling and Performance Metrics

Through a real-life cross-selling case from the LISA materials, students examine how teams identify opportunities for account expansion. A mini workshop follows where students are given simulated accounts and must decide whether, how, and when to propose add-on services. Reflection questions tie this activity to performance indicators such as deal velocity and win rate.

Week 6 - Module 3: Team Communication and Remote Collaboration

Students explore team dynamics in high-pressure sales environments. After a short lecture, they take part in a structured role-play exercise in triads: one student is the sales rep, one the internal coordinator, and the third acts as a skeptical client. The objective is to practice aligning internally before presenting externally. A class debrief highlights pain points in virtual coordination and feedback culture.

Week 7 - Presentation Skills and Collaboration Tools

Building on the previous week, students co-develop a short pitch presentation in teams using collaborative tools such as Google Slides or MS Teams. Emphasis is placed on internal preparation, message consistency, and division of roles. Each group records its presentation, which will be peer-reviewed in Week 8.

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Week 8 - Peer Review and Feedback Practices

Using the video presentations from Week 7, students conduct structured peer reviews based on rubrics aligned with LISA competencies (clarity, preparation, responsiveness). An instructor-led session synthesizes key takeaways, focusing on psychological safety, team learning, and the use of asynchronous feedback tools.

Week 9 - Module 4: Introduction to Sales Data Analytics

Students begin working in a computer-equipped lab environment. They are introduced to CRM data visualization using Excel or browser-based dashboards. Each student receives a fictional dataset and must identify bottlenecks and underperforming customer segments. A short write-up accompanies their dashboard.

Week 10 - Business Intelligence and Forecasting Exercises

The focus shifts to predictive analytics and client prioritization. A case from the Strato Automotive scenario guides students through interpreting deal progressions and recommending actions based on KPIs. Students present one insight each during a lightning round and receive immediate instructor feedback.

Week 11 - Module 5: SalesTech and AI in Inside Sales

A guest expert delivers a virtual lecture on AI tools in modern sales (e.g., chatbots, predictive lead scoring). Students explore selected tools through screenshots and demonstrations. In-class discussion focuses on the trade-offs between automation and personalization. A short reflective assignment asks students to evaluate one tool's impact on the customer experience.

Week 12 - Final Portfolio Submission and Presentations

Students submit a capstone portfolio including: (a) a pipeline report from Module 4, (b) a video sales pitch, and (c) a brief reflection paper on how digital tools influence team collaboration. Each group delivers a 5-minute presentation on their portfolio, receiving both peer and instructor feedback. Final grades are based on portfolio quality, engagement, and peer assessments.

This full 12-week format illustrates how the LISA programme can be flexibly mapped into conventional academic calendars, balancing theoretical instruction with simulations, peer work, and technical training. It ensures that students meet the learning outcomes while engaging deeply with the practices and tools that define inside sales in the digital economy.

3.2 . Scenario 2.Three-Week Executive Training for Working Professionals

The second scenario adapts LISA to an intensive executive training format for working professionals in sales and business development roles. Instead of spreading the modules over an





entire semester, the programme is compressed into a three-week course that blends in-person seminars with online collaboration and self-directed assignments.

This format targets participants who already operate in commercial roles and seek to update their skills in inside sales, digital tools, and data-driven decision-making. The emphasis is on immediate workplace transfer: each activity is designed to feed directly into participants' own pipelines, processes, and team practices.

For training providers and vocational institutes, this scenario demonstrates how LISA's core competences can be delivered in a time-efficient way without losing depth, by combining short conceptual inputs with high-intensity casework, peer learning, and capstone projects tied to real organisational contexts.

Week-by-Week Implementation Plan

Week 1 - Laying the Operational Foundation (Modules 1 and 2)

The course begins with two in-person seminar days, designed to establish a common framework for understanding inside sales in the digital era. Following an introductory orientation, participants are asked to complete a diagnostic reflection: "How is inside sales currently structured in your organization?" Responses are shared and compared in moderated plenary sessions, revealing cross-sector similarities and divergences in lead management, deal progression, and client communication.

The instructor then introduces theoretical content from Modules 1 and 2, including sales cycle models, customer lifecycle logic, and the operational structures behind remote-first sales teams. These concepts are presented alongside LISA mediacasts, and participants are prompted to contrast their internal workflows with ideal-type processes.

To anchor the theory in real-world complexity, a sector-specific case is introduced: for example, a B2B machinery supplier shifting from on-site demonstrations to virtual sales consultations. Working in sector-based groups, participants analyze the company's pain points, propose process adaptations, and simulate a modified CRM pipeline reflecting remote sales strategies.

The week concludes with a hands-on exercise in process mapping. Using templates from the LISA toolkit, each participant drafts a flowchart outlining their sales team's pipeline and identifies two potential bottlenecks or inefficiencies. Peer feedback is provided in small rotating discussion rounds.

Week 2 - Communication, Collaboration, and Data-Driven Practice (Modules 3 and 4)

Week two transitions to online delivery, emphasizing digital collaboration and analytical fluency. Participants are organized into fixed breakout groups to work through two structured scenarios aligned with Modules 3 and 4.

The first task focuses on remote teamwork: "You are onboarding two new inside sales reps in a distributed team. Develop a collaboration protocol to ensure team visibility, accountability, and shared targets." Participants must co-author a team charter using MS Teams, Trello, or other collaboration tools. Guidelines specify that the document must address internal communication

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norms, division of tasks, reporting mechanisms, and conflict resolution strategies. Groups submit their charters for asynchronous peer review and instructor commentary.

Midweek, the course pivots to sales analytics. Participants receive a pre-formatted CRM dataset (anonymized but reflecting real structures) and are asked to complete a guided analysis. Each group must extract three key insights from the data, on lead conversion, customer churn, or pipeline velocity, and visualize their findings using charts or dashboards. A coaching session is scheduled at week's end, where each group presents its analysis to the cohort and receives feedback on the clarity and business relevance of its insights.

A short individual reflection task is assigned: "What is the role of data in decision-making in your current team? How could CRM-based indicators improve your sales forecasting or customer segmentation?"

Week 3 - Technology, Integration, and Strategic Application (Module 5 + Capstone Assessment)

The final week returns to a synchronous online format focused on digital toolsets and technology integration. Building on Module 5, the instructor delivers a live lecture on emerging technologies in inside sales, focusing on CRM platforms, automation tools, and AI-supported functions like predictive scoring and chatbot integration.

Participants are then invited to conduct a self-audit of their current workplace tech stack. They complete a worksheet evaluating which tools their teams already use, where integration is weak or siloed, and which AI-enabled tools could realistically be introduced to support productivity and responsiveness.

The week culminates in a capstone task. Each participant prepares a 5-minute recorded or live pitch outlining a digital optimization plan tailored to their sales team. This plan must incorporate:

- At least one process improvement (Module 2).
- A communication or collaboration recommendation (Module 3).
- A dashboard or data point relevant to performance tracking (Module 4).
- A proposed tech enhancement (Module 5).

These pitches are shared in a closing plenary. Participants are encouraged to offer constructive peer feedback based on structured criteria: clarity, feasibility, integration across modules, and potential business impact.

Pedagogical and Organizational Impact

This implementation model demonstrates LISA's adaptability to vocational and executive learning environments. By intensively combining applied exercises, industry-tailored cases, and sectoral peer exchange, the course accommodates the practical needs of adult learners while preserving the core pedagogical principles of the LISA project: competence orientation, digital readiness, and workplace transferability.

Despite the condensed duration, all five modules are activated in practice, with weekly themes linked to participant deliverables and cumulative reflection. The inclusion of diagnostic activities, real tool usage, and cross-sector feedback further strengthens learner engagement and the perceived relevance of the training.





Moreover, this format supports immediate workplace implementation. Participants leave with process maps, collaboration protocols, and data dashboards that can be adapted to their teams, as well as actionable plans for digital optimization grounded in the realities of their operational contexts.

This expanded version of Scenario 2 provides a comprehensive template for institutions or training providers aiming to implement LISA in intensive or executive formats, demonstrating both the versatility of the curriculum and its alignment with adult learning methodologies.

3.3 Scenario 3. Asynchronous Online Course for Distance Learners

The third scenario shows how LISA can be implemented as a fully asynchronous online course for geographically dispersed and part-time learners. Here, the programme is delivered over ten weeks as a 5 ECTS elective, relying entirely on a Learning Management System (LMS) and carefully designed digital pedagogy rather than live sessions.

This model is intended for universities and training providers serving distance learners, working adults, or students with limited scheduling flexibility. It demonstrates how LISA's modules can be translated into self-paced units that still offer structure, interaction, and feedback through discussion forums, peer review, quizzes, and portfolio-based assessment.

The scenario provides a concrete example of how to balance flexibility and academic rigor: it shows how to use LMS features, mediacasts, and interactive tasks to maintain engagement and progression, ensuring that learners can build inside sales competences even when they cannot attend synchronous classes.

Course Design and Platform Integration

The course is structured into weekly units aligned with the five core LISA modules, further subdivided into focused themes to allow digestible progression. All materials, videos, readings, exercises, and submission portals, are hosted within the institution's Moodle-based Learning Management System (LMS), supplemented by tools such as Panopto for video content and H5P for interactive elements. Students access a week-by-week calendar detailing all assignments, deadlines, and self-assessment opportunities, along with a visual course roadmap that connects topics to overarching learning outcomes.

Tutor presence is maintained through weekly announcements, feedback on key assignments, and participation in asynchronous discussion threads. Although the course requires no live sessions, it embeds multiple interaction points through peer assessments and forum-based reflection tasks, ensuring continuity of engagement and social learning despite the flexible structure.

Week-by-Week Learning Path

Week 1 is dedicated to orientation. Students are introduced to the LISA framework, review course logistics, and complete a short diagnostic quiz on their prior knowledge of digital sales practices.

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They are invited to post a brief introduction in the forum, sharing their current experience with sales or customer interaction.

Week 2 (Module 1: Introduction to Inside Sales) centers on role understanding and structural models. After watching the mediacast “What is Inside Sales Today?” and reviewing an accompanying slide deck, students complete a reflective writing assignment: “Compare the role of an inside sales representative in a remote-first company to that in a traditional sales team.” Responses are posted to a discussion forum where students must comment on at least two peers’ submissions, fostering asynchronous dialogue and cross-perspective learning.

Week 3-4 (Module 2: Inside Sales Processes and CRM Tools) introduce structured sales workflows. Students are given an annotated pipeline template and asked to adapt it to a given scenario: a tech company entering a new B2B market. They submit a completed workflow map and a short written rationale for their approach. In Week 4, they are given CRM screenshots and asked to diagnose where in the pipeline inefficiencies might occur. Feedback is provided through rubrics and tutor commentary.

Week 5 (Module 3: Communication and Team Dynamics) integrates interpersonal and organizational learning. Students watch the mediacast “Improve Team Communication in Inside Sales” and are tasked with diagramming a communication workflow for a fictional remote team. Diagrams are uploaded to the LMS and assigned for anonymous peer review. Each student provides structured feedback on another’s submission using a standardized evaluation grid (e.g., clarity, alignment, completeness). The goal is to deepen learners’ capacity for critical reflection and to simulate workplace-level document review practices.

Week 6-7 (Module 4: Data and Sales Intelligence) offer a more technical component. Students are given access to a browser-based CRM dashboard simulation. They are instructed to manipulate sales variables, e.g., number of follow-ups, timing of outreach, to improve the close rate. Each learner then records a 3-4 minute screen-capture presentation summarizing their findings, including visualization of KPIs and a brief explanation of trends observed. This exercise allows for individualized interpretation while reinforcing practical fluency in CRM-style data environments. Tutor feedback highlights not only the accuracy of interpretations, but also the clarity and professionalism of the data narrative.

Week 8-9 (Module 5: Sales Technologies and AI Tools) center on emerging technologies. Students explore slide decks and brief video explainers on CRM platforms, sales automation, and AI applications such as chatbots and content recommendation engines. A guided worksheet requires students to map the digital tools currently used by a company they know (or a fictional case), and to propose two technological improvements to support pipeline efficiency or customer responsiveness. This serves to connect technical literacy with business analysis.

Week 10 (Review and Assessment) includes a cumulative knowledge check and a final reflection. The knowledge check is a 20-question quiz spanning all five modules, using scenario-based questions that test conceptual understanding and applied decision-making. For the reflection task, students submit a short journal entry: “How will AI change your role as a future sales professional?” This encourages learners to internalize the broader implications of digital transformation in sales contexts.

■





Evaluation, Feedback, and Pedagogical Effectiveness

Despite the lack of live interaction, student progress is actively monitored through LMS analytics, quiz completion, and discussion forum participation. The design ensures consistent feedback loops: tutors provide written feedback on key assignments within five working days, and automated quizzes give instant results to reinforce learning. The peer review elements promote a sense of community and allow students to see how others conceptualize and solve similar problems.

This asynchronous implementation also benefits from flexibility in assessment. The final portfolio submission, comprising a pipeline map, dashboard presentation, and strategic tool proposal, replaces a formal exam and is assessed using a rubric aligned with LISA's competence goals. Students appreciate the relevance and practicality of the assignments, which are designed to simulate real workplace tasks and challenges.

Conclusion

The LISA programme's practical implementation is best understood through adaptive, scenario-based planning. Whether deployed in a semester-long university course, a vocational boot camp, or a fully asynchronous LMS pathway, LISA's structure accommodates diverse learner profiles and institutional realities. By embedding real-world tasks, fostering collaboration, and providing industry-relevant examples, educators can transform the course into a truly experiential learning journey. The key to effective implementation lies in careful alignment between module content, delivery modality, and local educational objectives, supported by the extensive guidance and modularity offered by the LISA framework.

3.4 Technical and Organizational Advice to Facilitate Local Adoption of the LISA Programme

Successful implementation of the LISA (Learning Inside Sales Academy) programme in diverse educational or training contexts requires not only pedagogical alignment, but also well-considered technical and organizational planning. While the curriculum and content are modular and adaptable, institutions must take proactive steps to ensure that their infrastructure, staffing models, and internal processes are compatible with LISA's objectives. This section offers a structured overview of key technical and organizational considerations, drawing from early pilot implementations and feedback from partner institutions.

I. Technical Infrastructure and Platform Readiness

The LISA course was designed to be digitally enabled across formats, synchronous, asynchronous, blended, and as such, requires a functional digital infrastructure for smooth delivery.

1. Learning Management System (LMS) Integration:



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LISA modules should be hosted within a stable and user-friendly LMS such as Moodle, Canvas, Blackboard, or proprietary university systems. Each module should be set up as a distinct unit, with folders for:

- core materials (slides, mediacasts, transcripts).
- weekly assignments or quizzes.
- discussion forums or reflection journals.
- instructor announcements and timelines.

Clear labeling, intuitive navigation, and consistent formatting across modules are critical to student engagement and accessibility.

2. Multimedia Compatibility:

LISA contains a wide range of media assets, including audio lectures, video mediacasts, and interactive documents. Institutions must ensure that:

- all students have access to devices (laptops, tablets) with audio-visual capabilities.
- Internet connectivity supports streaming and download functionality.
- captioned or transcript versions are made available for accessibility compliance.

3. Toolkits for Digital Competence:

To simulate inside sales environments, students should engage with tools such as CRM platforms (e.g., HubSpot, Pipedrive), data visualization software (e.g., Tableau, Excel), and collaboration platforms (e.g., Slack, MS Teams, Trello).

Where live platforms are not feasible, institutions can provide mock-ups, sample dashboards, or sandbox environments. Alternatively, instructors may rely on screenshots and walkthroughs to illustrate usage.

Provision of these resources, even at a basic level, significantly enhances digital readiness and learner immersion.

II. Organizational Readiness and Staffing

Beyond technical platforms, local adaptation of LISA depends on the institution's organizational ability to allocate staff, schedule learning activities, and ensure continuity across delivery modes.

4. Instructor Preparation and Collaboration:

Given LISA's interdisciplinary character, combining sales knowledge, communication, data literacy, and tool fluency, institutions should consider team teaching models or shared facilitation. For instance:

- a faculty member with a marketing background may teach Modules 1-2.
- a communication specialist may guide Module 3 activities.
- a data or IT instructor can support Modules 4-5, particularly analytics and AI tool sections.





The adaptation manual encourages cross-departmental coordination and provides templates for dividing teaching responsibilities. Shared mediacasts and readings create coherence across facilitators.

5. Local Syllabus and Credit Allocation:

Academic institutions must define how LISA fits into existing curricula. A common model is integration as a 5 ECTS elective, with workload expectations of 120-150 hours.

In vocational or continuing education settings, LISA may be modularized into short-term certifications (e.g., “CRM and Pipeline Management,” “Sales Communication in Remote Teams”).

In all cases, the learning outcomes and assessment criteria should be documented in institutional syllabi, ensuring clarity for learners and staff.

6. Scheduling and Pacing:

For universities with a semester structure, LISA may be delivered over 10-14 weeks. For training centers or corporate partners, it can be compressed into a 3-5 week intensive.

The manual provides flexible pacing templates for both use cases, as well as options for hybrid teaching (e.g., online lectures plus in-person simulations).

A calendar of suggested activities, deadlines, and check-ins should be distributed at the start of the course to support learner time management.

7. Administrative and IT Support:

Implementing LISA requires close collaboration with support units, particularly instructional designers, IT teams, and programme coordinators.

Their involvement is necessary to:

- upload and organize digital content.
- troubleshoot platform issues.
- coordinate enrolment and permissions.
- provide technical onboarding to faculty and students.

Institutions are advised to appoint a local course administrator or coordinator to ensure operational continuity, particularly where LISA is delivered across multiple cohorts or departments.

III. Local Adaptation and Continuous Improvement

Finally, institutions adopting LISA are encouraged to view the programme not as a static product but as a living curriculum adaptable to local needs.

Customizing Case Studies and Examples:



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Educators can replace or supplement existing LISA case files with local company examples or regional sales contexts. For instance, a Polish university might integrate case material from domestic e-commerce firms, while a French business school might draw on luxury goods sales.

Feedback Loops:

Post-course evaluations should solicit feedback on technical accessibility, clarity of materials, perceived relevance, and instructional support. Results should inform minor modifications to future runs (e.g., reordering modules, improving LMS instructions, adding language support).

Language Localization:

Although LISA is delivered in English, institutions serving non-English speaking cohorts may consider translation of key readings, subtitles for mediacasts, or bilingual glossaries.

Conclusion

For LISA to succeed as a scalable and sustainable component of modern sales education, institutions must ensure technical access, organizational coordination, and curricular alignment. These efforts do not require advanced infrastructure or large budgets, but rather proactive planning and cross-functional collaboration. By investing in thoughtful adoption strategies, from platform setup to instructor training, institutions can fully leverage LISA's pedagogical strengths and provide learners with a future-oriented, digitally grounded educational experience in inside sales.



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4. Evaluation and badge issuance

The LISA project incorporated an Open Badge framework as a core strategy for evaluating learner achievement and certifying the acquisition of relevant competences. Drawing from the broader goals of WP4.2, the implementation of assessment mechanisms and micro-credentialing via Open Badges has been evaluated for consistency, validity, and relevance, both in terms of pedagogical effectiveness and technical feasibility.

Assessment Framework and Certification Logic

Each of the five modules of the LISA course was designed with clearly defined learning outcomes and assessment strategies. Completion of a module required learners to engage with its core content, videos, manuals, and case-based materials, and to pass a final assessment that verified understanding of key competences. A dedicated Open Badge was then awarded per module, serving as a digital certificate aligned with the micro-credentials policy promoted by the European Council (2022/C 243/02).

This modular certification structure reflects several core strengths. First, it provides learners with tangible, incremental recognition of achievement, allowing them to progressively build a verified skill profile in Inside Sales. Second, the structure encourages completion by embedding motivation mechanisms: badges are only awarded upon meeting the completion and assessment criteria. Finally, the modular approach increases the flexibility of the training pathway, allowing learners to engage with selected modules based on individual or institutional needs without requiring full programme completion.

As reported in the Open Badge documentation, badges were issued based on clearly articulated performance standards. Badges were linked to both participation and successful completion of assessment activities. These criteria were transparent and consistent across modules, and implementation was supported by the LISA platform ([open-badge.eu](https://www.open-badge.eu/)), which ensured technical verifiability and alignment with the IMS Open Badges standard.

Platform Integration and Technical Validation

The badge platform used (<https://www.open-badge.eu/>) supports all key validation criteria: transparency, portability, traceability, and international compliance. The metadata associated with each badge includes the module title, detailed description of competences acquired, issuing institution, and timestamp. This structure ensures that badges can be used effectively on professional networks (e.g., LinkedIn, Europass) and recognized across institutions.

From a user experience perspective, the survey data reveal overall satisfaction with platform access and functionality: 50% of respondents found it very easy to navigate, with only isolated





technical complaints (e.g., slow video playback, podcast quality). The technical infrastructure for badge issuance was thus not a barrier to uptake or perception of credibility.

Strengths of the Badge and Evaluation Model

One of the strongest features of the LISA badge and assessment system lies in its integration with wider European lifelong learning policies. By designing micro-credentials that are aligned with strategic objectives, such as promoting modularity, transparency, and skills recognition, the project contributed directly to EU-level education targets.

Second, the modular architecture and independent badge awards increased learner autonomy and flexibility, which are key to adult and professional learning. Badges were tailored to reflect the specific learning objectives of each module, such as CRM usage, sales data analysis, or virtual collaboration. This allowed participants to selectively pursue competencies relevant to their own career path or job function.

Third, the badges offered long-term value. Since the LISA platform remains accessible beyond the project's end, learners can continue to engage with content and obtain certification at their own pace. This post-project sustainability reinforces both the usability and credibility of the badge system.



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