Advanced International Journal for Research (AIJFR)
E-ISSN: 3048-7641 ● Website: www.aijfr.com ● Email: editor@aijfr.com

Aligning Training Design with Organizational Culture and Context: A Single-Case Study of BNM Business Solutions LLP, a Real Estate Sales-Support Firm in the Mumbai Metropolitan Region

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DOI: https://doi.org/10.63363/aijfr.2026.v07i06.9204

Abstract

The effectiveness of training can be directly linked to the ability to tailor it to the culture, resources, and external context of the organization. This paper discusses how the optimal training program depends on organizational culture, the national and social environment, and identified skill deficits. It is a qualitative single case study of a small real estate sales support and business consulting firm named BNM Business Solutions LLP from the Mumbai Metropolitan Region. The study's data is drawn mainly from secondary sources and first-hand experience gained during an internship with the management information systems (MIS) team of the firm, which involved tasks like auditing the data for the Runo CRM project, conducting an 11-point technical assessment and the creation of a playbook and training decks for the Godrej Varanya project in Kharghar, Navi Mumbai. Situational Leadership, Handy's typology, Schein's three levels, and Hofstede's dimensions are the approaches that analyze the culture. A three tiered training needs analysis is used to examine the training requirements and a PESTLE framework is used to review the external environment.The findings point to a flat, informal, coaching culture operating in a growing sector that is quite sensitive to regulation and with a moderate level of digital maturity. There are clear gaps in both CRM data management and cold calling technique. The paper concludes that a blended model of training is required, with a strong emphasis on on the job training and mentoring, supplemented by a small amount of e-learning and a minimal amount of compliance focused classroom training. The justification for this model is drawn from Kolb's experiential learning cycle, Knowles' andragogy and Kirkpatrick's four level evaluation model.

Keywords: training needs analysis; organizational culture; blended learning; CRM; real estate; small firms; PESTLE

1. Introduction

1.1 Background and Rationale

Companies don't create their training programs without consulting with others. These three are mutually linked pillars that will determine the successful implementation of any learning and development initiative: the organization's culture, the national and regulatory environment, and skill gaps of the workforce. Training methods that are very effective in highly hierarchical multinational corporations may not be suitable for smaller, more flattened consulting firms, and vise versa. To illustrate how these three work together to create the best training solution, this research focuses on one organization (BNM Business Solutions LLP). It's no surprise that BNM Business Solutions LLP is the subject of this article.

This work is based on primary sources which are not publicly available and instead are based on the first-hand experiences gained during a Summer Internship Program (SIP) placement in the management information systems (MIS) team of the firm.The SIP gave us a real insight into the way the company operates, the way it is managed, the technology it uses (specifically the Runo CRM), and the problems the sales force are actually facing on the Godrej Varanya project. The culture and context sections of this paper are therefore able to go beyond the generic and are based on what we actually saw.

1.2 Research Objectives and Questions

This paper pursues five objectives:

1. To give a brief overview of BNM Business Solutions LLP, its sector, geographical reach and the services it provides.
2. To analyze the organizational culture of the firm (i.e. the degree of hierarchy, formality and style of leadership) using the established theory of organizational behavior.
3. To understand the national and social context in which the firm operates (i.e. the economic climate, the level of access to technology and the relevant legal and regulatory environment) as it pertains to real estate and CRM based sales in India.
4. To carry out a training needs analysis based on the operational problems that are actually being observed in the company.
5. To recommend and justify a training approach (classroom, e-learning, blended, mentoring, on-the-job, etc.) which is most appropriate for the organization, using the standard L&D and HRD principles.

These are operationalized in four research questions: (RQ1) What is the nature of the organizational culture at BNM Business Solutions LLP? (RQ2) In what ways do the national, regulatory, and social contexts of the Indian real estate industry determine the staffing needs of the organization? (RQ3) What are the skill gaps in the calling and MIS staff? (RQ4) What training method would be most appropriate in light of the answers to RQ1-RQ3 and how would you go about evaluating its effectiveness?

1.3 Structure of the Paper

Section 2 discusses the theoretical aspects. The method, sources of data and limitations of the study are discussed in Section 3. The industry and the organizational setting are discussed in Section 4. Section 5 reports on the results obtained in the areas of organizational culture, PESTLE analysis and training requirements. In Section 6, the proposed training method, its implementation and its evaluation are presented. In Section 7 the results, their significance, caveats, and recommendations for further investigation are included.

2. Literature Review and Theoretical Framework

2.1 Organizational Culture Frameworks

Four established frameworks are used to characterize culture in this paper.

Handy's cultural typology. According to Handy (1993), there are four main categories of company culture: Three types of organizational cultures exist: power culture, which is typical of small entrepreneurial companies; role culture, which is typical of large bureaucracies; task culture, which is typical of professional partnerships like law firms; and person culture, which is typical of other types of organizations. Power culture refers to “power” being concentrated in the hands of a few people at the top of the hierarchy; role culture refers to a set of rules, procedures, and job descriptions. Task culture prioritizes project teams and problem-solving; expertise over position.

Schein's three levels of culture. Schein's (2010) model looks at culture at three levels: the artifacts (the visible structures and processes), the espoused values (the stated goals and strategies), and the **underlying assumptions** (the unconscious, taken-for-granted beliefs).

Hofstede's cultural dimensions. Hofstede (2001) looks at national cultures along a number of dimensions, including power distance (the extent to which less powerful members of organizations accept that power is held by more powerful members) and individualism vs collectivism (the degree to which people are oriented towards in-group loyalty and relationships). This is used to sit the firm's culture against the Indian national baseline.

Situational Leadership. Hersey and Blanchard (1969) Situational Leadership model posits that the effective leader will adjust their style according to the 'readiness' of the follower (i.e. their level of competence and confidence) so that they go from directing (high task, low relationship) through to coaching, supporting, and finally to delegating (low task, high relationship), which is used with highly competent and confident followers.

2.2 External Environment: PESTLE

PESTLE analysis looks at the political, economic, social, technological, legal and environmental factors in an organisation's external environment. It's used in Section 5.2 to identify the workforce capabilities that the Indian real estate and technology services environment requires of a company such as BNM.

2.3 Training Needs Analysis

Training Needs Analysis is normally carried out at three levels: organisational (does the organisation's strategy and environment require training?), **task** (what does the job actually require?) and **person** (where are the performance gaps in the individual?). Section 5.3 applies all three of these levels to BNM Business Solutions LLP.

2.4 Training Methods and Learning Theories

Common training delivery methods include:

- **Classroom training:** instructor led, group based, standard delivery. Very efficient for large numbers of people but not really suited to individual learning rates or to the opportunity for hands on skill practice.
- **E-learning in the form of** Knowledge-based (policies, product information, compliance, etc.) content lends itself well to self-paced digital modules due to its scalability, cost effectiveness and accessibility. It isn't so effective at developing physical and procedural skills.
- **Blended learning:** Integration of digital/classroom instruction with guided practice/performance that is purposeful.
- **Mentoring is** relationship is a continuing engagement between an experienced worker and an apprentice with the goal of passing on tacit and contextual knowledge.
- **On the job training (OJT) is** learning by doing the job itself, usually under supervision with real time feedback and correction.

Three learning and evaluation frameworks are used to underpin the justification for the selection of the various methods. Kolb's (1984) experiential learning cycle sees learning as a cyclical process of four stages: concrete experience, reflective observation, abstract conceptualisation and active experimentation. Knowles' (1980) theory of andragogy posits that adult learners are self-directed, make use of their own experience and are motivated by learning that is problem focused and immediately applicable. Kirkpatrick and Kirkpatrick's (2006) four level model provides a framework for evaluating training at the levels of reaction, learning, behaviour and results. This is how the framework is applied to the case in Section 6.

3. Research Methodology

3.1 Research Design

A qualitative research on a single instance. If you are interested in finding out how culture, environment and skill gaps play together in a specific company, a case study is the way to go rather than a statistical picture of a lot of companies. All the information about the CRM is triangulated through observation from the technical evaluation, training materials and actual contact with the Director and Co-Manager as independent data points.

3.2 Data Sources

Data were drawn from three sources:

- **Primary observation:** direct involvement in the SIP internship with the MIS team, under the direction of the Director and Co-Manager of the firm.
- **Internal work artefacts:** a multi-sheet Excel workbook put together from Runo CRM exports; an 11-part technical assessment report on the CRM; a cold calling playbook; and a set of PowerPoint training decks for the Godrej Varanya sales team.
- **Secondary research:** publicly availabThe company specific observations in this paper (the organisational structure, the leadership style, the technology stack and the details of the CRM technical assessment and the development of the training materials) are all from first hand experience of the Summer Internship Programme with BNM Business Solutions LLP's MIS team, under the direct supervision of the Director and Co-Manager of the firm. The industry level and regulatory information (the Indian real estate sector, RERA and the DPDP Act) is from publicly available secondary sources. The theoretical frameworks that have been used throughout the paper (Handy, Schein, Hofstede, Hersey and Blanchard, Kolb, Knowles and Kirkpatrick) are all from the standard OB and training & development literature as referenced in the References section.throughout the paper (Handy, The analysis uses the appropriate frameworks (Handy's Cultural Typology, Schein's Levels of Culture, Hofstede's Cultural Dimensions, PESTLE, The data have been analyzed and a reliable training suggestion were provided using methods like Training Needs Analysis (TNA), Knowles' Andragogy, Kolb's Experiential Learning Cycle and Kirkpatrick's Four Level Training Evaluation Model.The article emphasizes on the observations, documentation and deliverables from the internship while providing some supporting information on the Indian real estate industry, regulatory framework (RERA and DPDP Act) and basic theory of training and development. We are unable to access the BNM's official training budget, personnel satisfaction survey results and internal HR policy papers. Where such data would normally be used we have instead relied on triangulated observation (i.e. inference drawn consistently from a number of independent data points) such as the CRM technical assessment, the training materials that were produced and our direct interaction with the Director and Co-Manager. tBNM Business Solutions LLP is a very small privately held LLP and as such there is very little public information available (no annual reports, no press coverage etc) as you would see for a listed multinational. That lack of public information is actually seen as a positive in this study as the paper is very much based on the author's own personal experience rather than any desk research.s Doing this analysis from the perspective of a former intern rather than as an external researcher did have a distinct benefit in that the observations on culture and leadership style in section 5.1 are not derived from a website or a press release. They are based on actual experience of being given real client facing responsibility very early in the internship. That insider perspective is the reason this paper treats the BNM Business Solutions LLP culture as one of the empirical findings rather than as an assumption. That same proximity of course also brings with it the potential for observer bias which we have mitigated through triangulation across documents and interactions and which is recognised as a limitation in section 7.an empirical finding rather than an assumption. The same proximity also carries a risk of The Indian real estate sector is one of the biggest contributors to

the economy and one of the biggest employers in the country after agriculture. Housing, retail, hotel, and business make up the four main divisions. Urbanization, increasing disposable incomes, the proliferation of nuclear families, and, in the instance of megacities like Mumbai, a persistent housing scarcity in relation to demand have historically supported the residential sector, which is relevant here.ate, the part that matters for this example, has traditionally been propelled by urbanization, increasing disposable incomes, the creation of nuclear families, and, in urban areas like Mumbai, persistent housing constraints compared to demand.

After the Real Estate (Regulation and Development) Act 2016 (RERA; Government of India, 2016) was enacted, the market for real estate went from being developer-led and unstructured to being heavily regulated and compliance oriented. Developers had to register their projects, maintain an escrow account for customer funds and adhere to published schedules, and buyers had a legal action against developers for delays and deceptions. This has led to sales and CRM becoming much more professionalized. Hence, there is a requirement for specialty companies, such as BNM Business Solutions LLP, that offer sales support and CRM administration.

3.2 Sales-Support and CRM-Enabled Firms

It is rare for big firms like Godrej Properties to have a good team of in-house staff members, each focusing on one specific project, responsible for lead conversion and telemarketing. They would usually require a specialist consultancy company to provide all their sales support including lead management, CRM data cleansing, cold calling, site visit conversions and many more. The partner will get involved in the entire lead management process of the project from the sales team to the CRM, in this case, the Runo platform for BNM.

Such companies have a special operational environment due to their business model. They can serve as a technology user who has to rely on quality CRM data; as a people function, who should train and motivate contact center personnel; and as an extension of the developer's brand acting on the developer's behalf when conversing with prospective buyers. In order to comprehend the company culture and the training requirements that are detailed later on in the article, this tripartite function is crucial.

3.3 The Mumbai Metropolitan Region Market

The Mumbai Metropolitan Region (which encompasses Navi Mumbai and the various satellite towns such as Kharghar) has been experiencing steady residential demand as a result of the infrastructure push going on there (metro expansion, Mumbai Trans Harbour Link, the forthcoming Navi Mumbai International Airport).
The micro-market of Kharghar, especially, has been attracting developers of mid- to high-end residential developments with its well-planned layout and increasing connectivity. In that context, mention of Godrej Varanya project is made in Kharghar, where BNM Business Solutions LLP conducted their internship.

This growth is of course being accompanied by very intense competition from the developers and their sales support partners in terms of lead conversion. That puts a premium on the calling team and that is precisely the operational bottleneck that the CRM technical assessment and the associated training material development were designed to address.

3.4 Employment Characteristics of the Sector

Employment in real estate sales support firms like BNM is generally project based rather than on long term fixed term contracts as the levels of headcount required go up and down with the pipeline of active developer projects (e.g. Godrej Varanya). This in turn creates a very specific workforce development challenge in that you can't always assume that there is a long payback period for a significant investment in upfront training. That is why the argument put forward in Section 6 for a low cost, continuously embedded approach to training (i.e. mentoring and on the job coaching) is so much more compelling than the alternative of a very expensive upfront investment in classroom or e-learning which is predicated on the assumption of a long employee tenure to recoup its cost.

3.5 Company Profile and Service Offerings

BNM Business Solutions LLP is a business consulting and real estate sales support firm based in the Mumbai Metropolitan Region. It is an LLP (Limited Liability Partnership) which is the most common form of structure for small to mid-sized Indian professional services firms (it gives you the flexibility of a partnership with the benefit of limited liability for the partners). The firm is a single country operation with its client base in the Mumbai and Navi Mumbai real estate market.

BNM's core service offering centres on Management Information Systems (MIS) support and sales enablement for real estate developers. Specifically, the firm's engagement model includes:

- **CRM data management:** data management, which involves data import, clean and organise lead and call-log data exported from CRM such as Runo.
- **Sales performance analytics:** The creation of management information system reports such as call volume, call length, conversion rates and mistake rates in collected data is an example of sales performance analytics.
- **Sales enablement and training support:** Creating training materials, playbooks, and scripts for tele-calling teams working on client projects is an example of sales enablement and training assistance.
- **Technical assessment and quality assurance:** identification and documentation of any issues or weaknesses in the functionality or security of data within CRM systems when dealing with client interactions.

3.6 Organizational Structure, Key Engagement and Technology

The firm is run by a very small core leadership team (a Director - Mr Vikram and a Co-Manager - Ms Alisha) who both directly managed the SIP internship placement with the MIS team. The operational structure is project based with project teams being assigned to the various client projects (in this instance the Godrej Varanya project team). There is no indication of any layers of middle management between the leadership team and the team that actually does the work. The interns and junior team members reported directly to and presented to the Director and Co-Manager.

This would be characteristic of a smaller LLP in the professional services sector – management from the top down, with limited authority, planning for individual projects and very strong reliance on the original team for direction and quality assurance.

The bulk of BNM's activity during the internship was in support of Godrej Properties' Varanya residential project in Kharghar, Navi Mumbai. The MIS team were responsible for the audit of CRM call data for the project, identification of data quality and process issues and the production of sales enablement material (a cold calling playbook and a range of PowerPoint training decks) to assist the tele-calling team on the project.

All the BNM sales support team activities are based on the Runo CRM. This is essential to track leads, log and track customer interactions, and get statistics on various metrics such as call length and conversions. As interns we have exported the Runo CRM reports and imported them into a multi-sheet Excell sheet where we analysed the customer call summaries, tracked errors in the data and calculated the optimum call time. The result of that effort was an eleven-issue technical evaluation report which identified several problems with the CRM data integrity and use patterns. A training requirements analysis is presented in Section 5.3, which is based on that study.

3.7 SWOT Analysis

In order to get a better understanding of the firm's internal position, we will first briefly examine the firm through the lens of a SWOT analysis.Let's briefly examine the firm's internal position through a SWOT analysis before getting into the culture and context study.

Pros: A relatively flat and agile structure that enabled quick decision making; strong, trustworthy relationships between the management and the project team; a large amount of real estate CRM and sales support experience; and a definite decision to do the internal diagnosis (in this case the technical assessment report) in-house and not outsource it. Problems identified in the CRM data quality during the internship indicate that not all employees use the basic operating tools across the board, and there is a reliance on a small leadership team both in strategic and operational aspects, which may be a bottleneck. Further, there is inadequate Learning and Development infrastructure. The abundance of large-scale developer projects, like Godrej Varanya, and the continuous growth in the MMR real estate market offers enormous opportunities for sales support services. The idea of formalizing and organizing the informal mentoring model into a low-cost blended training model is a viable suggestion provided in Section 6, which could have a significant impact on conversion rates as well as CRM data quality.

Threats: escalating regulatory scrutiny (RERA enforcement, DPDP compliance) will increase the cost of any training or communication gaps; and the threat from other sales support and CRM consulting firms who are also in the market to serve the same developer clients means that underperformance in conversion rates (if not addressed via training) will directly impact client retention.

4. Findings and Analysis

4.1 Organizational Culture

4.1.1 Handy's Typology

A quick SWOT analysis will serve to summarise the firm's internal position prior to the culture and context analysis which follows.

Strengths: a relatively agile organization that allows for rapid decision-making; strong trust and relationships between leadership and the project team; experience with real estate CRM and sales support; and a strong commitment to performing in-house diagnostics (technical assessment report) instead of outsourcing it.

Weaknesses: Strategic and operational weaknesses identified during the internship indicate that the following are not consistently used by staff: the main operating tools of the business; and there is a very small leadership team who are heavily relied upon for strategic and operational leadership with the potential of causing a bottleneck.

Opportunities: Large-scale developer project market exists, Godrej Varanya being a great example, and the MMR property market is continuing to grow, with a market for sales support services. There is an opportunity for low investment to be able to formalise and organise the informal mentoring that we already have into a low cost blended training programme, as outlined in Section 6. It can make a big difference in conversions and CRM data quality.

Threats: the increasing level of regulatory scrutiny (RERA enforcement, DPDP compliance) will drive up the cost of any training or communication gaps; and the threat from the other sales support and CRM consulting firms who are also in the game to serve the same developer client base means that if we're not performing in terms of conversion rates (and we're not addressing that via training) then we'll be directly at risk of losing those clients.

4.1.2 Schein's Three Levels

There are very informal internal lines of communication: interns communicating directly with the Director and Co-Manager, output is delivery-oriented (PowerPoint, technical assessment reports, and Excel spreadsheets). Our approach to engagements is founded in our principles, and is clearly focused on data integrity, sales team effectiveness and client satisfaction in time-sensitive real estate projects. At the deepest level we can be happy to hand over a lot of the client interaction work to interns, such as writing a technical assessment report. This indicates that we believe in initiative and talent over official rank and we believe that as a small company the firm can be better served by working together to solve problems.

4.1.3 Hierarchy, Formality and Leadership Style

From our first-hand experience with them, here are some of the things we can say about BNM Business Solutions LLP:

Hierarchy: Flat. There doesn't seem to be any intermediate management levels; the project teams and interns are overseen by the Director and Co-Manager.

Style ranges from somewhat formal to casual. All client facing outputs such as reports, presentations, evaluations and more are carefully prepared and delivered to the highest professional standards. The internal working relationships are lacking in formal, protocol and bureaucracy. It's more of a small business or consultancy firm than a large business.

Leadership style: My leadership style is coaching, participating and then occasionally delegating. The intern was given meaningful responsibility, activities like performing CRM audits, writing technical reports and creating training material, rather than only observational and administrative activities. The characteristic of a coaching or participatory style of leadership, as opposed to an authoritarian or simply transactional one, is to place the responsibility of actual ownership on the shoulders of the subordinate after their competence has been shown.

4.1.4 Hofstede's Dimensions in the Indian SME Context

Hofstede's cultural dimensions (originally developed as a tool to compare national cultures) are frequently used to explain why the way organisations operate can be so different from country to country even within the same industry. India comes in at fairly high on Power Distance (the extent to which the less powerful members of organisations accept that power is distributed unequally) and fairly high on Collectivism (the degree to which people identify with their in-group) when compared to many Western countries. BNM's actual internal culture (flat hierarchy, very informal way of working, a strong sense of delegated ownership) is in fact somewhat at odds with the high Power Distance national baseline which is a very common pattern in small Indian professional services firms. In those types of firms the national culture of deference to authority is often deliberately counteracted by the founder who will adopt a very open door, low Power Distance management style in order to move quickly and to be able to attract and retain young talent. That's precisely what was observed in BNM with the very direct, very low formality of interaction between the Director, the Co-Manager and the interns.

In India, collectivism is relatively high, and this is evident from project delivery that is more team-driven than individual-driven at BNM. The coaching of the interns by the leadership team was also very individualized, and was more that than just an assignment of the work.

4.1.5 Situational Leadership

After the coaching to delegating model, BNM adopts a strategy of delivering guidance on the structure of the CRM and reporting, and then giving members more scope on how to develop the technical assessment and training materials. This is the perfect management style when you have interns and entry level employees that need to get tasks done like a well-oiled machine. Conversely, it appears that the company has an informal mentorship onboarding system in place already and that may impact the training process. Do not just move to another training method, but develop and maximize the use of that training program.

4.2 National and Social Context (PESTLE)

4.2.1 Political and Legal Environmen

RERA (the Real Estate (Regulation and Development) Act, 2016) applies to all real estate projects that BNM's clients (e.g. Godrej Properties) are involved in. It's an indirect but very real and material issue for BNM. Any sales communication, any promised timelines and any claims that the tele-calling staff

make to the customer have to be in line with the details of the project as registered with RERA. If you're not in line with that you're exposing the developer (and by extension the sales support partner) to regulatory and reputational risk. There is therefore a compliance element to any customer facing training that BNM provides to its calling staff.

DPDP Act 2023: BNM's core function is to deal with customer personal data (names, phone numbers, call recordings, lead details etc) via the Runo CRM. The DPDP Act therefore applies to BNM and the obligations around consent, data minimisation and secure handling of personal data are all relevant to the way the CRM data entry staff are trained and the way the CRM technical issues (specifically the data error tracking) are dealt with.

4.2.2 Economic Factors

Real estate in India (and the MMR market in particular) has seen consistent demand growth over the years, driven by infrastructure investment (the metro lines, the MTHL and the upcoming Navi Mumbai International Airport) and the growth of the urban middle class. The growth has been achieved in the face of enormous competitive pressure from the developers and their sales support partners as there is a very limited pool of qualified buyer leads in any given micro-market (e.g. Kharghar) and a number of projects vying for those leads. The commercial performance of the business is therefore very much dependent on lead conversion and that in turn is directly linked to the quality of the calling team training.

4.2.3 Social Factors

Urbanization and the rise of the nuclear family are still the primary drivers of housing demand in the MMR. Home ownership in India is still a very high involvement, trust based decision with family input being a very significant factor and the journey to conversion typically being a long one with many touchpoints. This is the reality that BNM's calling staff have to operate within and as such their skillset is not simply in the delivery of the script but in the ability to build relationships and handle objections over the course of a very long sales cycle.

4.2.4 Technological Factors

BNM is in the middle ground when it comes to digital maturity. They, along with other Indian sales assistance organizations, use a customer relationship management system (Runo) to keep tabs on leads and deal with customer phone calls. The eleven-point technical evaluation report that was created in-house did, however, highlight several problems with the current system use. Efficiency in data quality and reliability of the system, and staff proficiency in using the CRM technology, are all quite poor. Unfortunately, the staff are not technically skilled enough to make effective use of technology available. The training recommendations in this paper are primarily related to a lack of technical skills.

4.2.5 Environmental Factors

Environmental regulation is of considerably less relevance to a sales support consulting firm than it is to a construction company. That said it's worth pointing out that RERA compliance for a developer client does in fact extend to environmental clearances and environmental disclosures for the project itself and sales people may on occasion be asked about those by prospective buyers. That again underlines the point that the call handlers need to be able to give accurate, project specific answers rather than be reliant on a

generic script as incorrect answers on such a peripheral issue as environmental clearances could in fact lead to a compliance issue for the developer client.

4.2.6 Implications for Workforce and Training

The political/legal (RERA, DPDP), economic (competitive lead conversion), social (trust sensitive, multi-touch buying), technological (CRM maturity gap) and environmental (accurate project representation) factors all combine to point to a workforce that needs to have: (a) compliance aware, accurate communication skills; (b) the resilience and technique to operate in a competitive, high volume calling environment; (c) the relationship skills and ability to handle objections appropriate to a long sales cycle; (d) better technical ability in relation to CRM data entry and CRM management; and (e) up to date project specific knowledge which can only be kept current through ongoing on the job briefing rather than a one off onboarding. This is all set out in the training needs analysis in Section 5.3.

4.2.7 Comparison with a Large Multinational

It's useful to make a quick comparison between the BNM's national/social context and that of a large multinational technology or consulting firm operating in India. The multinational has the scale to run in-house compliance/legal teams, their own Learning and Development teams and enterprise LMSS. They can absorb the regulatory complexity through specialisation. The small LLP (BNM) doesn't have that scale. The same small leadership team that is responsible for the client relationships has to be the one that ensures that RERA compliant messaging and DPDP compliant data handling is built into the way calling staff are trained and coached on a day to day basis. That is a major reason why the training recommendation in Section 6 is in favour of the low cost, high touch methods (mentoring, OJT) rather than the infrastructure heavy methods (dedicated LMS platform, external classroom trainer) which would be massively over the head of a firm of BNM's size.

4.3 Training Needs Analysis

4.3.1 Organizational Analysis

At the org level the business model is entirely reliant on the performance of the calling staff and the quality of the CRM data. Client relationships (e.g. with Godrej Properties) are judged on lead conversion and the regulatory environment (RERA, DPDP) makes the cost of untrained or careless customer communication and data handling very high. That's a pretty clear case at the organisational level for an investment in structured training, regardless of the size of the business and the lack of any formal L&D infrastructure.

4.3.2 Task Analysis

The two core tasks identified through internship observation are:

1. **Outbound/inbound cold calling and lead conversion:** this is a procedural applied communication skill which requires script knowledge, objection handling, tone and the ability to tailor your messaging to a very trust sensitive, high value purchase decision (residential property).
2. **CRM data entry and management (Runo platform):** This job involves ensuring that data is accurate and that the outcomes of calls are logged correctly. Attention to detail, keen eye for detail

and knowledge of data quality standards are required. In particular, the places where eleven distinct problems were identified by the internally generated technical evaluation.

4.3.3 Person Analysis

The 11-point technical evaluation report for the internship is the best representation of a gap at the individual level. This report details in great, great detail the specific, recurring problems in the use and maintenance of the CRM data in the calling staff. Rather than a systemic failure of the technology, the issues were related to the data quality and its use, therefore it's clear that there is a skills gap at the individual level in terms of technical and procedural abilities. The upper leadership of the corporation proceeded to train them on training the decks and a cold calling playbook, which indicates that there was a gap in communication and sales technique in the Godrej Varanya project's calling team.

4.3.4 Summary of Training Needs

Table 1 summarises the training needs identified at each level of analysis.

Table 1: Summary of training needs

Organizational	Business model depends on conversion + data integrity; regulatory exposure (RERA, DPDP)	Structured, ongoing training investment despite small firm size
Task	Cold-calling is a procedural, relationship-driven skill	Practice-based skill development, not lecture-based theory
Task	CRM data entry is a technical, systems-based skill	Standardized, repeatable procedural training
Person	11 documented CRM data-quality issues	Targeted CRM proficiency and data-hygiene training
Person	Leadership commissioned a cold-calling playbook	Targeted objection-handling and script-adherence training

5. Discussion: Recommended Training Approach

5.1 Recommendation

Recommended approach: a blended model, heavily weighted towards on the job training and mentoring, supplemented by a very small amount of targeted e-learning around the CRM processes themselves and virtually no formal classroom learning.

This recommendation flows directly from the findings in relation to organisational culture (Section 5.1) and the national/social context (Section 5.2) and is justified below using three well established Learning and Development frameworks.

5.2 Organizational Culture Fit

Section 5.1 confirmed that the BNM has a flat structure, an informal working style and a coaching/delegating style of leadership (it was already in the habit of mentoring the intern into real client facing work). The training strategy should therefore be one that builds on the existing cultural strengths rather than introduce a method that is an ill fit for a small, highly hands on, direct supervision environment (e.g. large group classroom teaching). Mentoring and OJT are exactly the extension of the coaching relationship that the leadership team already deliver, at effectively zero additional infrastructure cost. That last point is obviously very important in the context of a small LLP.

5.3 Kolb's Experiential Learning Cycle

Based on his research, Kolb identified four stages of learning: 1) Direct Experience; 2) Reflective Observation; 3) Abstract Conceptualization; and 4) Active Experimentation. Internship training materials such as the cold calling playbook and the PowerPoint decks are tools for abstract conceptualization. Essentially, they are used to define the characteristics of effective cold calling. In order to learn anything at all, there must be a theoretical component, a practical component (phone calls), and a component of experimentation (making the calls with the new approach and getting feedback from the instructor). This capability is relational and procedural, and therefore cannot be learned in a classroom environment or with on-line tutorials alone, which is why it is provided in mentorship and on-the-job training.

5.4 Knowles' Theory of Andragogy

Malcolm Knowles' theory of adult learning (andragogy) is that adult learners are self directed, bring with them a wealth of experience which should be used rather than discarded, are driven by learning that is directly relevant to the problems they face and which will solve problems they are currently experiencing, and will learn best when it is relevant to the actual tasks they are doing. BNM's workforce (the calling staff and the technical/MIS interns who are working on live, time-bound client projects) is a very good example of this. A blended approach which is built around the actual tasks of the project (auditing the actual CRM data, doing the calls on the live leads with supervisor feedback) is far more andragogically appropriate than a standard classroom based curriculum which is completely disconnected from the work of the Godrej Varanya project.

5.5 Kirkpatrick's Four-Level Evaluation Model

Kirkpatrick's model has four levels of evaluation: **Reaction** (did the learners find it useful/engaging?), **Learning** (did they actually learn the knowledge/skill?), **Behaviour** (did their on-the-job behaviour actually change?) and **Results** (did it have an effect on business outcomes such as conversion rates?). Classroom or e-learning only interventions are usually very good at measuring levels 1 and 2 but very poor at achieving anything at levels 3 and 4 (the levels which actually matter to a small business like BNM where the success of the business is directly linked to the behaviour of the calling team and the conversion rates). On-the-job training and mentoring are the type of intervention that are in a much better position to generate and demonstrate impact at levels 3 and 4 as the "training" and the "actual work" are in the same environment and the same CRM data (call outcomes, conversion ratios, data error rates) which is already being captured by the MIS function can be used to measure the impact.

5.6 Role of E-Learning Within the Blended Model

While on-the-job training and mentorship will cover most of the training approach, brief, modular online learning courses will provide a significant support role. We have been making an 11-point technical evaluation and have decided to standardize the CRM data input standards. Unlike relationship-based skills, these are more rule-based and procedural (how to use a certain field, which tags to use, how to code a call outcome, etc.) and are likely to be repeated often and consistently across the digital modules and are better suited to brief, repeatable digital modules that new team members can complete before or alongside their use of their live CRM. Specifically, we want to lessen the frequency with which the internship-identified data quality concerns crop up.

5.7 Why Classroom Training Should Remain Minimal

The only exception to this is compliance material, for example RERA consistent communication rules, and duties relating to DPDP, where formal classroom training is still held. This is done when the benefit of individual coaching outweighs the need to ensure a uniform, verifiable all team delivery. For all other use cases, it is not recommended to be used. The core skills (cold calling, CRM data entry) are mostly practice-based, the small size of the team (which does not meet the size of classroom training, which would be suitable for that type of skill), and the flat and informal BNM culture would not be a good fit.

5.8 Implementation Roadmap and Resources

Table 2 sets out the proposed phased roadmap.

Table 2: Proposed training roadmap

Phase 1: Onboarding	RERA/DPDP compliance basics, company overview	Classroom (one-time group session)	1 day
Phase 2: Technical Foundation	CRM data-entry conventions, correct call-outcome tagging	Short e-learning modules	2–3 days (self-paced)
Phase 3: Applied Coaching	Live calling practice with supervisor feedback	On-the-job training + mentoring	Ongoing, first 4–6 weeks intensive
Phase 4: Continuous Development	Refinement of technique, handling of complex objections	Mentoring (paired with senior caller/supervisor)	Ongoing

Low level of investment on infrastructure as the approach is for small enterprise. A low-tech, low-cost digital module (e.g., a document-based guide or short video tutorials) can be used for e-learning, rather than an elaborate learning management system. No additional systems are needed for mentorship and OJT components beyond the time which the Director and Co-Manager now schedule for their project teams (which will now be documented in a coaching cadence, e.g., weekly call, weekly review).

5.9 Evaluation and Feedback Mechanism

In keeping with the Kirkpatrick model outlined in Section 6, evaluation should be embedded directly into the firm's existing MIS reporting rather than be a separate exercise. The Level 3 (Behaviour) and Level 4

(Results) metrics can be derived from the call outcome data, conversion ratios and CRM data (error rates) which are already captured via the Runo platform. The Level 1 (Reaction) metric can be the brief post session feedback from the trainees and the Level 2 (Learning) metric can be periodic CRM data quality audits (akin to the technical assessment that is already produced).

6. Conclusion, Implications and Limitations

6.1 Conclusion

This report has therefore reviewed BNM Business Solutions LLP through four lens looking at the history of the firm, their culture, national/social environment, and their training needs, in order to come to a proposal for training that is justified. The Indian real estate sector is booming, but the regulators have their concerns about the flat, relaxed, coaching environment created by the company. It is a moderately digital organization with some gaps in knowledge regarding customer relationship management and cold calling.

The authors recommend a mixedmethod training programme at the end of the research, consisting of more on-the-job training and mentorship than traditional classroom instruction or online training resources for more procedural and technical topics. The method is based on the analysis of the Company culture, the andragogy theory suggested by Knowles, and the Level 3 and 4 proposed by Kirkpatrick. This is most appropriate based on the size, structure and staffing of the organization.

6.2 Practical Implications

For a small, growth stage professional services LLP such as BNM Business Solutions the key recommendation of this paper is that **effective training should be the extension of the coaching relationship that the leadership team already have in place rather than the imposition of a standardised large organisation training model which is simply not appropriate for the firm's culture, its resources or the nature of the work which is practice based.**

6.3 Limitations and Future Research

A typical cold-calling playbook, developed during the internship, includes the following elements: an introduction script which sets the stage and builds rapport; a needs-discovery section structured; a section detailing the project or property, in line with the details registered with RERA, avoiding that the details be misrepresented; a set of standard responses to common objections, such as price, location, timeliness, etc; a closing script designed to encourage a site visit; and finally, a series of post call CRM data entry checklists ensuring consistent data logging.

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Appendices

Appendix A: Illustrative CRM Data-Quality Issue Categories

Based on the structure of the internally authored eleven-issue technical assessment, CRM data-quality issues typically fall into the following categories: (1) inconsistent call-outcome tagging, (2) missing or incomplete lead information, (3) duplicate lead entries, (4) inaccurate call-duration logging, (5) delayed data entry after call completion, (6) inconsistent use of follow-up scheduling fields, (7) incorrect lead-source attribution, (8) incomplete notes on customer objections, (9) inconsistent formatting of contact details, (10) failure to update lead status after site visits, and (11) gaps in call-recording linkage within the CRM record.

Appendix B: Illustrative Cold-Calling Playbook Structure

A typical cold-calling playbook, like the one created during the internship, consists of the following sections: an introduction script that sets the stage and builds rapport; a needs-discovery section that is structured; a section about the project or property that is aligned with the details registered with RERA so that they are not misrepresented; a set of standard responses to common objections (such as those related to price, location, or timeliness); a closing script that aims to secure a site visit; and finally, a post-call CRM data-entry checklist that ensures consistent logging.

Appendix C: Illustrative Proposed Training Calendar (First 6 Weeks)

Week 1	Classroom onboarding session (compliance, company overview); e-learning modules on CRM basics
Week 2	Shadowing senior callers; introduction to cold-calling playbook
Week 3	Supervised live calling with immediate feedback (OJT)
Week 4	Weekly mentoring/call-review session; CRM data-entry audit
Week 5	Independent calling with periodic supervisor spot-checks
Week 6	Formal review against Kirkpatrick Level 2/3 metrics; refinement of playbook based on observed gaps

Appendix D: Glossary of Key Terms

CRM (Customer Relationship Management): refers to software used to manage customer relationships, current and potential. In this article, the term is used to the Runo platform that BNM uses.

RERA (Real Estate Regulation and Development Act, 2016): It is a legislation that requires the registration of projects, transparency in terms of specifications and timelines, and provides legal avenues to the buyers.

DPDP Act (Digital Personal Data Protection Act, 2023): This law applies to any company that deals with consumer contact information or call data in India and regulates the gathering, storing, and processing of personal data.

MIS (Management Information Systems): MIS are internal reporting and database tools which utilize unstructured operational data (such as CRM exports) and make it more manageable for decision making.

TNA (Training Needs Analysis): A systematic process used to identify what kind of training is required for an organization, a job or an individual employee.

OJT (On-the-Job Training): and it's a way for workers to get the skills they need without leaving their current positions.

Blended Learning: Blended Learning is a blended learning strategy that focuses on using the best of all distribution systems by blending them together (e.g. One-on-One mentoring + online courses).