Accelerate Sales Onboarding

7 Step Onboarding Program to Increase New Hire Productivity
Don’t Throw New Hires into a Sink or Swim Situation

As a sales leader, getting new reps up to speed quickly is one of your most important jobs. The sooner they’re able to make quota, the better. Yet the reality is, most sellers struggle to achieve proficiency in their new position. Many never make it.

The impact of this churn is costly. Brad Smart, author of Topgrading for Sales, states that the average cost of a failed ramp-up is six times the base salary for a salesperson. This includes the costs of hiring, compensation, lost sales opportunities, upset customers, team disruption and more.

The reality is even more challenging. According to The Bridge Group, the average sales development rep stays in the job for only 1.4 years. For field sales reps, the Sales Revenue Group reports that the average tenure is slightly less than two years.

That’s why it’s essential to develop an onboarding program that helps more of your new reps succeed in the shortest possible timeframe. This not only helps you meet your numbers, but it also minimizes the revolving door syndrome that plagues most sales organizations.

“The key to long-term sales success is short-term sales success.”

- Jill Konrath, author of Agile Selling
A New Hire’s Learning Curve is Grossly Underestimated

According to research by CSO Insights, sales rep ramp time (the ability to consistently meet quota) ranges between 3-12 months. For a simple sales cycle involving a low cost/low risk decision, a rep can achieve this proficiency in three months. But as decision complexity increases, so does ramp time. Reps have more to learn about everything.

Giving reps a short orientation, then turning them loose to figure things out on their own is a set up for failure. So is assigning a rep to shadow a top performer for a few weeks. Most new hires lack the context or experience to know what to look for or ask the right questions.

It also doesn’t work to try to cram as much information into their brains in the shortest possible time. This fire-hose strategy overwhelms reps, delays knowledge and skill acquisition and ultimately leads to failure.

To shorten a new sales rep’s ramp time, reduce turnover and drive more revenue growth, leverage the following seven step program.
Step 1

DEVELOP A 30-60-90 DAY ONBOARDING PLAN
Give New Sales Reps a Roadmap

New salespeople need to know specifically what they have to learn and in what sequence. Even experienced sellers need this – especially if they’re working in a new market segment where they lack familiarity with products, buyers, and decision processes.

The initial goal of this plan is situational credibility within 30 days. After a month, your new hires should be able to:

- Have a decent conversation with prospects without sounding like a novice
- Ask insightful questions that position them as a credible resource
- Demonstrate their knowledge of a buyer’s issues, challenges, objectives and more

You’re not just planning for thirty days though. To ensure your new hire succeeds, it’s essential to create an onboarding plan that continues for a minimum of 90 days.
Map Out Your New Hire Plan

Start by identifying everything new hires need to know to make quota on a regular basis. In the chart to the right, you’ll find six quadrants covering the primary areas of learning. It can take a while to fill it all in.

Once you’ve identified all the knowledge and skill sets required for success, determine what reps “need to know” now versus what can be learned later.

This sorting process enables you to create a calendar of learning that includes activities, interviews, sales skill training and more – all designed to get reps up to speed quickly.

Map out what new sales reps need to know in Week 1, Week 2, 30 Days, 60 Days and 90 Days. You’ll find lots of good ideas in the upcoming pages.

Also, consider this an iterative process. Once you start using this onboarding plan, you’ll quickly discover ways to make it even better.

Knowledge and Skills Required for Success

- **Company**
- **Customers**
- **Product/Services**
- **Sales**
- **Technology/Tools**
- **Competition**
Create a Sales New-Hire Portal

If you don’t have a “pre-boarding” process yet, you might want to consider how you can create one. Think about how you can leverage YouTube to create mini-learning sessions that highlight essential product information, interviews with external or internal subject matter experts, and customer success stories.

This will build up a new hire’s knowledge before they begin and get them excited about starting their job.

Make sure you create a sales portal that stores all this vital information. Be sure you include links to important industry/sales blogs and other resources used by your top sellers. Also, include samples of what’s working with today’s buyers.
Step 2

ESTABLISH THE RIGHT MINDSET
Transform Sales Problems Into Challenges

New hires want to be successful. While they’re eager learners, they haven’t fully committed to the profession yet. They’re still trying to determine if it’s a good fit.

As a sales leader, you know there are going to be bumps ahead that can undermine their confidence. That’s why it’s essential to have ongoing conversations with new hires about the mindset needed for sales success. You’ll need to help them learn how to turn their problems into sales challenges.

When new reps have a tough time, they immediately start wondering if the job is right for them. With fear clouding their thinking, new salespeople often do or say things that make it even more difficult to close deals.

As a sales leader, the last thing you want to do is exacerbate the issue. Instead, encourage your new reps to view problems as solvable puzzles. Brainstorm ideas with them. Show them different options. Help them rise to the challenge. New hires need you to believe in them – especially since they may not believe in themselves yet.
Failure is a Prerequisite for Learning

Reframe failure into valuable learning experiences. Every new sales rep is guaranteed to fail. They sound like idiots on the phone, mishandle objections, lose to competitors, and blow demonstrations. More than anything, new sales reps need to know failure is simply a part of learning. As a sales leader, help them figure out what they did wrong and identify ways to prevent future problems.

**Set the right goals for your new hire too.** Don’t let them get fixated on achieving quota in the first few months. For most, it’s a virtual impossibility. They don’t know enough. Nor do they have enough prospects.

Instead help them set “getting better” goals with achievable milestones. That way they’ll feel they’re making good progress. For example, to determine prospecting goals, start by having new reps make a designated number of calls their first week on the phones. Establish an initial benchmark by tracking the percentage of these calls that turn into initial conversations. The next week, the new reps should focus on increasing this percentage. Research shows these “getting better” goals are highly correlated with sales success.

Keeping your new hires in the right frame of mind helps them weather the rough initial months while they’re learning what works. Get to know your new reps on a personal level too.

Find out what’s important to them, what motivates them and what they’re hoping to achieve. When salespeople know you care about them and want them to be successful, they work a lot harder.
Step 3

START WITH BUYER IMMERSION
Know your buyer

Most companies begin their onboarding program with a massive product dump. Sometimes, it’s all the training their reps get. They think it’s what salespeople need most to succeed. Instead, it turns new hires into product-pushing peddlers whose spiel creates innumerable sales-derailing obstacles. It’s not the right place to start.

Here’s the crucial information you need to cover with your new hires:

- **Target market.** What kinds of organizations make the best prospects – and why? Be explicit: “Our best opportunities are with companies who have between 50-250 salespeople who sell to the corporate market because …”

- **Decision process.** How do your prospects make buying decisions today? What steps do they typically go through? Who’s involved at each phase? Most decisions today involve five or more people from various parts of the organization—who are they?

- **Status quo.** How is your target market currently doing things without your product or service? The status quo is your biggest competitor and ultimately what your reps are selling against. Identify 3-5 current status quos, and then expand on the issues/challenges they create.
New Salespeople Desperately Need Insights Into Their Buyers

- **Trigger events.** What external or internal “happenings” change organizational priorities and create a need for your offering? Events like new leadership, 3rd quarter earnings, and legislative changes are change catalysts that disrupt the grip of the status quo.

- **Individual buyer insights.** What’s important to each person involved in the decision process? Make sure your new hires understand the following information about each buyer involved in the decision process.
  - Primary roles and responsibilities
  - Likely business objectives
  - How their performance is evaluated (KPIs)
  - Common issues/challenges
  - Primary strategic initiatives
  - Value of making a change
  - Typical “day-in-the-life” scenario

Also, please note that this info is “in general.”
Step 4

SPELL OUT THE SALES PROCESS
Articulate How Your Company Sells

- **Lead generation/marketing.** Tell new reps what initiatives are currently underway, how salespeople are notified of new leads and the most effective way to follow up.

- **Initiating change.** 95% of buyers aren’t interested in doing anything. They’re too busy with other priorities. Your new hires need to understand what it takes to get a prospect to decide the status quo is no longer acceptable. It’s helpful to include this information:
  - Initial conversation guide that outlines the best way to kick-off a conversation, the right questions to ask, what to listen for, what the next step is, and how to handle objections
  - How to do a more in-depth analysis to determine the value of change
  - Case studies, ROI, or Total Cost of Ownership tools
  - Sample presentations that have led organizations to embrace change initiatives
  - Demonstration scripts that highlight key points and questions to engage buyers

- **Closing the deal.** After buyers have agreed that the status quo is no longer acceptable, they move to selecting the right options. Make sure your reps have these tools to help them achieve success faster:
  - Proposal and finalist presentation templates
  - Competitive differentiation insights
  - Proof sources, preferably from external resources
  - Implementation plan

If you don’t articulate how your company sells, new hires will make up their own way. Don’t leave their success to chance. Make sure to document each stage of the sales process.
Prospecting Should Be a New Hire’s Main Emphasis For the First 90 Days

Unless they can create a strong pipeline, there’s no way they’ll be successful. Spend the bulk of your onboarding time working with new hires on prospecting, as well as initial conversations. Once they have good prospects to work with, they’ll be highly motivated to learn the more advanced sales skills.

New reps need to create a decent pipeline of potential buyers.

To increase their likelihood of success, it is extremely helpful to create playbooks and cheat sheets like these:

- Value propositions for each of the primary buyers and main products
- Customizable voicemail and email templates that have proven effective
- 8 to 10-touch prospecting series to keep in contact with hard-to-reach buyers
- Examples of how to leverage trigger events
- Customer case studies that detail how other organizations have tackled similar challenges and the results they’ve attained
- Insights, ideas or info that could pique a buyer’s curiosity and add value
Step 5

BECOME A MASTER COACH
Top Sales Managers Invest 50% of Their Time Coaching

According to Dave Kurlan, CEO of Objective Management Group, sales leaders who consistently and effectively coach their salespeople grow revenue by an average of 26% annually. They also invest 50% of their time coaching. Sales managers who don’t coach—or who do it sporadically—continually struggle with mediocre (or worse) performance, and excessive turnover.

New hires need your guidance and support much more than you might imagine—especially if they’re fairly new to selling. In the earliest phases of coaching, your job is to ensure they can answer basic questions: What does your company do? Tell me about this product? How does it help? Why should I consider changing from the status quo?

Even after training, never assume new reps can answer those questions adequately. Usually what comes out at first is gobbledygook. They need practice explaining the basics as well as your coaching about what to omit or stress.

In the earliest phases of coaching your job is to make sure reps can answer basic questions.
Coaching on Sales Skills is Crucial for New Hire Success

At each step of the sales process, your focus should be on helping new reps get better by developing new skills. Check their knowledge and facts first, then move to skills coaching and finally strategy coaching. Here are some examples of this process in action:

To jumpstart prospecting success, have new reps observe your more experienced reps:

- Talk to your rep beforehand and tell them what to look for
- Afterwards, discuss what they learned
- Have them practice and tune their message
- Have them call you and leave a message
- Listen in and tell them what you liked and where they can improve

Use mock meetings (aka role playing) for skill development:

- Have reps present their call plans first, explaining to you what their objective is and how they’re going to achieve it
- Role-play, but go easy on your reps at first till they get past that gobbledygook stage
- As their skills improve, ask tougher questions or throw in some objections

Finally, don’t ever assume that experienced salespeople can jump right in and be successful in a new role without coaching. They still have to figure out how to sell your products – and it may require different knowledge, skills, and strategies than they’ve used in the past.
Step 6

LEVERAGE TIME-SAVING RESOURCES
Sales Tools and Technology

As a sales leader, one of your primary goals is to increase sales productivity. That’s why it’s imperative to provide your new hires (and entire sales team) with the tools and technology that makes it easier for them to be successful in less time. CRM systems provide the foundation, but more is needed.

In today’s business environment, these resources are a godsend.

- **Account research.** LinkedIn is a great resource to learn more about individuals, create account maps and engage prospective clients. LinkedIn Navigator helps your reps build customized prospecting databases and keep up-to-date on your targeted accounts. The free Charley App updates you on the individuals with whom you have upcoming meetings.

- **Alert services.** InsideView and Lead411 give your reps immediate updates on trigger events or targeted accounts. With these timely insights, your reps can identify new opportunities before your competitors.
Accelerate Customer Engagement With These Tools

- **Email software.** HubSpot Sales, LiveHive and YesWare inform salespeople when the emails they send are read and forwarded, when attachments are opened and more. Email templates and sequences can be automated.

- **Online meetings.** GoToMeeting, Join.me and Zoom.us enable remote reps to have in-person meetings, build relationships and speed up the sales process. Today's buyers often prefer these meetings.

- **Sale acceleration.** Companies like Velocify speed up the sales cycle at the same time that they accelerate ramp time for new reps. With prioritization technology, salespeople are fed the highest value opportunities each day. Additionally, the optimal outreach strategy for each sales prospect is recommended based on what's been proven to drive the highest contact and conversion rates. A contact strategy can include a mix of email, phone, and SMS communications.

Keeping up to date on emerging technologies is essential for increasing sales productivity.

Always be thinking, “What can I do to give my salespeople more time to prep for meetings or engage with prospects?”
Step 7
CREATE A CULTURE OF LEARNING
Four Ways to Create Continuous Learning

In today’s ever-evolving business environment, your entire sales team needs to be in continuous learning mode. They need to be alert to changes in buyer expectations and market dynamics. When necessary, they need to pivot quickly – which means the need to leverage new knowledge, strategies and skills. That’s what it takes to lead a high-performing sales team.

Here are some ways to make that happen:

1. **Create sales challenges.** Engage all your reps in exploring new ways to tackle emerging problems or long-term issues. Brainstorm questions like: How can we close more deals by the end of the month? How can we get more business with our existing customers?

2. **Set up experiments.** Have your reps try new approaches to see what’s most effective. For example, you might experiment with prospecting emails. Try changing different factors (e.g., subject line, first sentence, length, value proposition, or call-to-action) to see if you get different results. Create team contests to see who can deliver the best results.

3. **Explore failure.** When failure is a natural part of the discussion, it loses its nasty grip on reps. Conduct pre-mortems before big meetings, trying to figure out what could go wrong and how you can prevent it. Debrief losses, analyzing what you missed, where you messed up, and what you could do differently. Have reps share failures during team meetings – and the lessons learned.

4. **Set “getting better” goals for the entire team.** Have each rep (even the experienced ones) pick one area they’d like to improve on, put a plan together and then share what they’re doing with their colleagues.

Sales success skyrockets in learning cultures. New hires quickly pick up knowledge and skills from their colleagues. Ultimately, you’ll spend less time hiring and training new reps and more time reaping the benefits of their success.
Accelerate Time to Productivity of New Sales Hires

As a sales leader, you’ll be hiring lots of new reps throughout your career. The sooner you systematize your efforts the better. Yes, it takes time—especially at the front end—to pull together and implement a rock-solid onboarding plan.

But the alternative takes even more time. You get caught in a never-ending turnover loop that has a catastrophic impact on revenue growth and profitability.

Start by analyzing the data of your most recent hires to see what it reveals.

- Look at the process you currently have in place to identify any shortfalls.
- Engage colleagues and top-performing reps in filling in the gaps.
- Immerse yourself in learning everything you can to become a better sales leader.

You don’t have to do it all at once. You just need to get going, experimenting with new and better ways to onboard reps. Hold yourself accountable to creating measurable change.

When you give your new reps the best chance to succeed, it’s a whole lot easier for you to meet your numbers too.
About the Author

Jill Konrath is the author of *Agile Selling*, which has been dubbed an “onboarding bible.” Her other bestselling books include *Selling to Big Companies* and *SNAP Selling*.

She’s a globally recognized sales acceleration expert with over a quarter of a million LinkedIn followers. As a frequent speaker at sales conferences, Jill shares fresh strategies to help salespeople win more deals in less time.

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