SALES ENABLEMENT PILLAR
LEARNING

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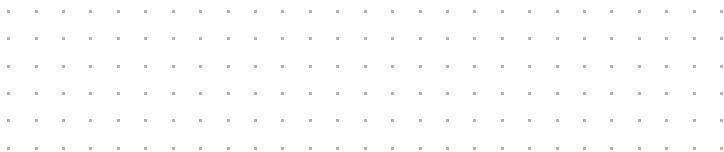# MASTERY

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**GROW YOUR BUSINESS FASTER BY ALIGNING
YOUR PEOPLE, PROCESSES, AND PRIORITIES**

Learning

When was the last time you watched the movie *Ferris Bueller's Day Off*? My family and I watched the movie on New Year's Eve in 2017. Our kids at the time were ten and almost eight. The film stars Matthew Broderick as Ferris Bueller, a high school slacker who spends a day off from school with a couple friends having fun in Chicago. One of the first scenes of the movie takes place in a classroom setting. A teacher, in a dry and monotonous voice, asks the class questions in a nonengaging manner. The kids' faces show boredom and blank stares. One student stares into space, blowing a bubble-gum balloon. No one wants to be there.

My kids thought the scene was funny. They were hysterical. They kept looking at each other, smiling and laughing. What was the private joke I was missing? They said that this way of learning was funny. Having a teacher ask rhetorical questions in a nonengaging way, basically reading from a textbook, is not how children expect to learn today.

In a world of interactive learning models, iPads, devices, whiteboards, storytelling, and collaboration, passive learning seems ancient to my children. They are lucky to have great teachers who make learning fun and engaging.

Today, we expect engaging, interactive, fun, thought-provoking, and immersive learning. Some call this a flipped classroom. Wikipedia explains the flipped classroom like this:

> Flipped classroom is an instructional strategy and a type of blended learning that reverses the traditional learning environment by delivering instructional content, often online, outside of the classroom. It moves activities, including those that may have traditionally been considered homework, into the classroom. In a flipped classroom, students watch online lectures, collaborate in online discussions, or carry out research at home and engage in concepts in the classroom with the guidance of a mentor.[7]

As enablement professionals, we are responsible for executing high-impact training. We spend days and months building curriculum. We work with our subject-matter experts to create training content. We spend weeks managing project plans having to create training content, review it, test it, validate it, and produce it. We do all this work and then, once the training is done, we wonder why we have not changed the mindset and behavior of our people. We wonder why we are not seeing the results we expect. It gets worse. Many researchers claim that up to 90 percent of what is taught is forgotten in less than a week. We spend so much money and resources, and we still do not see the desired results.

In this chapter, we explore the principles of active learning,

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7   "Flipped Classroom," Wikipedia.com, https://en.wikipedia.org/wiki/Flipped_classroom, accessed April 2018.

including how to create flipped classrooms in corporations to overcome learning and retention issues. We will review examples of active learning to increase learning outcomes to deliver better product training, skills training, assessments, social learning, coaching, and onboarding.

Enabling with Video Is Better

During one of my client visits in New York, I met up with my friend Chris Mezzatesta, chief revenue officer at Newsela. When Chris introduced me to his team, I felt a warm welcome. Everyone thanked me for being a part of their success. The gratitude came from top-performing sales execs, newly hired employees, and even the CEO. I was humbled.

I asked Chris what his secret was to success. He said that he and his teams are super disciplined about capturing company moments using video. They record every meeting and every all-hands call and publish it for current and future hires. Video helps companies like Newsela scale their learning initiatives and make their training more impactful.

Videos will not entirely replace face-to-face interactions, but they make our time together more productive. Videos should be informal. I am not talking about a marketing video that lives on a website. The kind of videos I am referring to here are the videos of someone sitting at their desk. I love seeing executives do a personal broadcast video from their home or office. It is OK to have pauses in a video and even the occasional "um" and "oh." It is real life. We are using video to capture real life as best we can. We will never remove the need for real human interaction.

Cost Savings

Companies spend an estimated more than three hundred billion a year on corporate training. We know how much it costs to fly teams to central locations to sit through training and workshops. How often do you hear: "The event was good, but most of what was covered could have been done over video"? How much money is wasted annually just on travel and entertainment expenses that could be avoided with more on-demand training?

Increased Knowledge

Knowledge retention from webinars, offsites, or conferences is quite low. Video is a way to modernize these practices by serving up short, accessible videos on demand for teams to watch and review on their own time before and after events. It also serves as a way to capture knowledge by asking teams to answer questions and share video updates. Technology is available to make this happen at scale, including capture, transcription, and full search.

Video is a proven way to scale peer-to-peer best-practice sharing. Silos come down with corporate video storytelling, and knowledge sharing is accelerated. Video is the way for product managers to get internal and external teams up to speed fast on new product releases, campaigns, and launches. Video becomes the ultimate in capturing and cross-pollinating ideas and feedback from virtual and distributed teams.

Increased Data

Video helps us know what content is being consumed by whom and what content is not valued. The power of video is that we

know who watched our videos and for how long. The analytics is there to answer the content-effectiveness questions in real time. The challenge we face is we do not fully understand how to effectively use video in our jobs, when to best use video, and what to use the videos for after we have them.

Human Connection

Video is powerful because, if done right, it is authentic, fast, efficient, memorable, scalable, personal, and repeatable. What I am talking about here is the kind of video that a real person records about their own personal experience. The kind of video that people know won't be shared on YouTube. These kinds of videos are the moments and the knowledge we want to help enable companies to capture. Video helps put humanity back into team communications.

When you see an authentic video, you get a glimpse into who a person really is by looking in their eyes and seeing their body language. You can tell a lot about their intent. Look in their eyes and ask yourself how much they are owning the content, or are they reading?

Healthy Competition Accelerates Learning

Videos that are recorded and open for viewing create a positive competitive environment. Who does not want to look great in front of their peers? Who will not put their best foot forward? My experience and the data show us that individuals and managers will step up and do the best work of their lives. The act of sharing a video to a team of peers that represents work goals and accomplishments will result in great outcomes. It is similar to hitting the gym. Doing the work and putting time in at the gym or on a treadmill or the

pavement will yield positive outcomes. The same is true in a professional setting.

I was once asked to review a team's quarterly plans. They missed their team targets. The department leader called me up to ask for some help. What can we do to motivate the team? How can we get them to exceed their goals in the new quarter? We decided to have them make a video. We came up with a set of goals and walked the team through their team goals. After asking about obstacles and challenges, we removed all of them and then gave them a task. We asked them to take the plan template and record their plan. What happened next was amazing.

Everyone on the team put their heart and soul into the exercise. They recorded their videos, and as the videos came in, they became more intense. The team got energy from each other. One of the last videos to come in was recorded at three in the morning. I watched it, and I knew that person was going to exceed their goals, and they did. The salesperson was filled with purpose and intent. You could tell by looking at the body language, expressions, and hand gestures. He was carefully thinking through every word he was saying. Every word and sentence was calculated. He looked like an athlete ready to be on the field for the big game, and no one was going to come between this person and winning.

Managers are able to quickly see how their team is doing. They form an opinion from day one about how much coaching will be required to get this new hire productive and integrated.

Video storytelling is a powerful way to enable teams to share knowledge and be successful, and it is powerful for every role in a corporation. Some are faster to adopt than

others. Salespeople and customer-facing employees are naturally the early adopters. The best advice is to drive a video communication and enablement strategy from the top. Getting leaders to share their stories first in a nonformal way gets everyone motivated to share. The informality of a video lowers the barriers to entry for employees. Make videos personal, relevant, and accessible to realize the full benefits of cross-team knowledge sharing.

The Science of Learning and Reinforcement

I always somehow knew that people retained more knowledge by doing. You learn a new skill, and you practice it until you know it. I applied this theory to business. One day I got curious and wondered if there was any research or science behind my hypothesis.

Hermann Ebbinghaus was a German psychologist "who pioneered the experimental study of memory and is known for his discovery of the forgetting curve and the spacing effect. He was also the first person to describe the learning curve."[8] His central hypothesis states that increased learning comes from greater experience, or the more someone does something, the better they get at it. Learning will happen over time and over a series of actions completed over and over. Repetition works to help increase learning.

As enablement professionals, we need to apply these principles to all our learning programs. We need to create a

8 "Hermann Ebbinghaus," Wikipedia.com, https://en.wikipedia.org/wiki/Hermann_Ebbinghaus, accessed April 2018.

culture where learning is ongoing and repetitive. We want to teach our salespeople and managers to apply learning to the real deal to accelerate results. This learning technique is called active learning.

I uncovered another piece of research on learning retention. The Learning Pyramid was created by the National Training Laboratories in Bethel, Maine.[9] It states that our learning retention is directly related to the degree of active learning. It is an effective anchor to drive the principle of an enablement program grounded in active-learning principles. Real learning comes from making mistakes. And mistakes come from applying the learning to real-life scenarios.
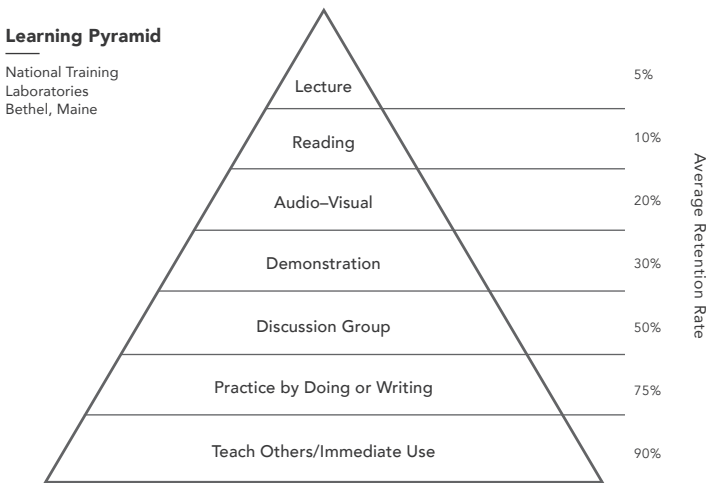
Learning Pyramid

National Training
Laboratories
Bethel, Maine

	Average Retention Rate
Lecture	5%
Reading	10%
Audio–Visual	20%
Demonstration	30%
Discussion Group	50%
Practice by Doing or Writing	75%
Teach Others/Immediate Use	90%

Figure 7.1: Learning Pyramid

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9   NTL Institute for Applied Behavioral Science, Alexandria, Virginia.

Adopting Active-Learning Techniques

Students show they have mastered subjects when they can verbalize in their own words what something means. They learn faster and apply things better when they practice, make mistakes, and get feedback. The fastest way to get people to learn a topic is to make them part of the learning process and to have them own their learning outcomes.

This active learning occurs when a person takes control of their learning experience. Active learning is realized through testing, assessments, storytelling, practice drills, and role-playing. Social learning accelerates the outcomes of active learning too, when experienced peers give each other feedback and coaching. Passive learning is through lecture. We will not be discussing the merits of lecture-based learning. Lectures fail to achieve results unless they are coupled with active learning.

We need to teach people in different ways for many reasons. People consume content and learn differently. Some people like to consume content by reading. Other people like to learn by watching videos. Some people prefer to collaborate and share ideas as a method of learning. For some, learning is a solo sport, and for others it's a group dynamic that helps optimize learning outcomes. Others prefer to put pen to paper and learn by writing. Some topics have more optimal ways of learning than others. Product training can be accomplished with a knowledge-check test. Let us review some of the more effective active-learning and assessment methods that work well for product training and skills training. These are great building blocks to custom design learning to meet your needs.

Icebreaker

The icebreaker method is intended to help people get to know each other and let their guards down. It is great to do at the beginning of a day-long training event or a virtual session. It is how most meetings should start when people are meeting for the first time. I like having people introduce themselves and share a fun fact about themselves. The ultimate icebreaker conversation starter is the "If you really knew me, you'd know that . . ." question asked at parties. Everyone introduces themselves and completes the sentence.

Other great icebreaker questions are—

- What is your role, and how long have you been at the company?
- What are you looking to accomplish from this training or event?
- What is your name, and what city are you from?
- What is your favorite band and why? What is the first music concert you attended?
- What is your favorite movie and why?
- What's your personal story?

Team Discussion

The next mode of active learning is to answer a question that maps to a specific topic. This type of active learning is called team discussion. Once you get into a topic, slow the curriculum down and have your students answer a question or share an experience to promote team discussion. Your teams should write down an answer on a piece of paper or key an answer into a system. The pen-to-paper method of learning is very

powerful. At the right point in your content and curriculum, have everyone sitting at tables or in their chairs write down their answers to a given question. If you have tables of eight to ten people, have everyone at a table share their answers, one by one. This is collaborative and inclusive learning. Each table can then share their conclusions and the lessons they learned. You can also pair people off and have person A share, then person B.

The team discussion is a great way to explore how people are internalizing the training. It is a great way to test knowledge in a non-testing way. It lets people start applying the topic to their jobs and workflow.

Role Play

Another active learning method is role play. With role-play exercises, teams are given a scenario, and they respond to the scenario. For salespeople, a good role play to practice is how to handle a typical customer objection. For customer support people, a good role play is to practice handling a tough customer conversation. A scenario is given with detailed instruction and then everyone responds to the scenario.

The role play can be handled in person in a classroom setting or online with video recordings. Ideal role-play exercises are optimized when the scope of the work takes less than five to ten minutes to optimize engagement. The power of the role play is to drive peer-to-peer feedback and learning from each other.

Create a library of scenario-based role-play exercises to help people be better prepared for conversations and tasks they will be performing in their day-to-day jobs. Documenting role-play scenarios and creating a forum and space to role-play is the job of enablers.

Stand and Deliver

Another method of active learning is stand and deliver. The way this learning method works is to have students prepare a presentation that they then deliver before a team. The presentation can be an elevator pitch, a product demonstration, an executive presentation, and so on. It can be short or long depending on the goals.

I was speaking with Roque Versace, a well-respected sales leader and friend, and he shared with me that the stand and deliver method was the best way to ensure that sales professionals learn. "Get up and pitch," he said, "whether it be corporate messaging, the product value proposition for a particular industry, competitive handles, elevator pitches—whatever it is you want a rep to know.

"Nothing delivers as well as an employee doing a live pitch. They often kick and scream, but after the exercise, the feedback is that the stand and deliver exercises were the most helpful." The pressure of being seen by their peers and the competitiveness of sales professionals heightens their senses and brings out the best in them. Technology makes stand and deliver cost effective and scalable. A company can leverage video, mobile, and social on a global scale—without flying everyone in—to make sure their reps have learned what they need to learn to be successful. The stand and deliver active-learning method works great for new-hire onboarding, product launches, and sales kickoff events.

Building a culture where stand and deliver happens often is incredibly valuable in improving employee productivity and knowledge sharing. There are many ways to do stand and deliver to improve learning outcomes. Managers have their teams do presentations in one-on-ones and in team huddles.

Departments run stand and deliver during team offsites or in person. Department leaders spot-check stand and delivers when they travel and visit teams. Stand and deliver works best when managers and employees practice authentic coaching and feedback.

Incorporate Testing

Another method of active learning is doing knowledge quizzes. Testing is a great way to capture immediate knowledge readiness. It is our job to know what our teams need to practice so they can be the best at what they do. Testing and knowledge checks are a great way to reinforce learning, assess where we stand, and determine who on our teams understands the concepts and can apply them effectively in their jobs. Testing is done through questions and answers of all types.

Testing can be in the form of an online or written test where students answer questions. The question types are true and false, pick the right answers, pick multiple right answers, and essay questions. All are good and complement a diverse active-learning program. Some enablement programs do too much testing. Some organizations test daily, weekly, and monthly. Technology makes it easy to automate the distribution and testing of questions and answers. Try not to fall into that trap. Keep learning and assessments fun and creative. Learning outcomes will be enhanced, and students will appreciate the range of content and learning assessments.

Social Learning and Peer Reviews

Two of my favorite methods of active learning are social learning and peer reviews. The learning pyramid confirms

that people learn and retain the most when they are teaching others. An example of salespeople wanting to learn more and be better by sharing and peer reviewing comes from Sheevaun Thatcher. She was vice president of sales productivity at Host Analytics. She led the charge to improve rep confidence and competence around handling competitive positioning. The reps needed to quickly overcome their fears and be in a position to not let competitive objections defeat them. They sat with the leadership and recorded their top competitive objections. The videos were short and focused.

The results were eye-opening to Sheevaun and me. Everyone on her team was asked to watch the videos, and then they needed to be certified on one or more of those competitive objections. Over four days, on average their salespeople watched, recorded, and reviewed those videos at least forty-two times. Her people recorded their videos between five to seven times each. Repetition proved to be what the reps needed. They became ready in days, and they did it by boosting each other. Their pipeline skyrocketed by 27 percent in a week, and their competitive win rates improved by 42 percent.

Sheevaun and Host Analytics were looking to improve competitive win rates with peer-to-peer video challenges. The revenue outcome was clear and understood. The goals and missions were communicated and aligned. Sheevaun shared with me that "widespread understanding of the why is the sales enablement secret to driving behavior and results."

We saw similar results and engagement with many other companies. These stories and guiding principles both showcase the growing trend of sales professionals investing time to improve their skills by learning from each other.

Case Study: Reinforcing Product Training

One of the pieces of enablement excellence many companies skip is reinforcement. There are many flavors to reinforcement. Many believe knowledge checks test reinforcement. I will argue that applying the new skills and messages to real-life situations while collaborating with a team is the ultimate in reinforcement and is not done enough. Knowledge is more effectively consumed, shared, and retained in a team huddle.

A **huddle** is a way for teams to collaborate and share ideas. It is a proven way to help teams focus on key metrics like growing revenue and closing business. It is a way to connect priorities with content and with front-line manager coaching. While we're talking about sales coaching, this practice is a good one for non-sales managers to follow, too.

In sales, teams come together and huddle around a deal or a product launch. They share what they know, and they ask each other questions. Great managers facilitate dialogue that is about knowledge sharing.

Bob Kruzner, director of enablement from ServiceMax, shared with me some of the challenges he had with a product release. ServiceMax came out with three new product offerings. These products were strategic and material to growing the business and differentiating against the competition in pursuits with new customers and existing customers. They had a clear vision of how they wanted their teams to sell these products. Bob brought marketing and subject-matter experts together to build the Product Huddle.

They released huddles that walked their managers and sales teams through the new product offerings. They created consistency around how they wanted their teams to learn and share best practices. They used videos to communicate

positioning, a demonstration of the product features, quizzes, and Q&A modules covering typical objections. Bob created the Huddle to get the best practice in the hands of his teams, but more importantly he wanted his managers to facilitate conversation with their teams on the top objections. That is the ultimate in coaching and knowledge sharing.

Bob also had the teams engage with the product playbook to share how they would apply the product and content to active deals in their pipeline. Each team member shared a deal and gave others feedback. Collaborative discussions were created along with a practice pitch applying the product to that deal. The Huddle also included all the needed tools and assets that are helpful for sales teams.

The results were amazing. The teams were engaged. The teams were watching content and engaging with content in a whole new way that improved knowledge, tracked effectiveness, and boosted results. They are now closing bigger deals because the teams are collaborating to share best practices.

Launch Initiatives with Managers First

Sales enablement initiatives have a high degree of success when we ensure that front-line managers get the information first and are on message. Employee engagement is directly correlated to manager engagement. This is why we must first get managers aligned and then the entire team.

When managers are trained and certified first, their team's activities are 100 percent complete. The result is higher attainment. When a company rolls out a new pitch and managers go first, everyone gets certified faster and better. Higher sales attainment follows.

The data shows that when managers go first, the rest of the team follows. Knowing this, I was working with Chris Harrington, president from Domo. He appreciated the importance of his managers completing the messaging certification first. He needed to improve win rates fast, and to do that he needed to get his entire company speaking the same brand and company message. They needed to be able to quickly change the conversation to focus on customer-use cases and value. Chris went first and recorded his pitch from his Tesla right after a dentist appointment because he wanted his managers to go next. Chris wanted the "sales enablement party" to be started when his sales and services teams recorded their pitch certifications. He witnessed 100 percent completion by managers and 100 percent completion by his sales and services teams. It was the beginning of their sales transformation, and their results were incredible. They increased attainment by 300 percent and then also did another fund raise with a higher valuation.

I cannot overstate the importance of managers going first. There is a direct performance correlation between team quota attainment and a manager doing their pitch first. The data shows that salespeople will first go see their manager's pitch. They want to see how their manager does it. If a manager does one, the entire team will do one. If the entire team does one, the entire team will invest the time to score each other. Performance will improve. If the manager does not do one, all the collaboration and social learning is diminished.

Consider the number of learning touches that happens in a single productivity initiative led by managers going first. With a team of eight to ten individuals, if a manager goes first, then each member of the team will watch their

manager's presentation. Each person will then practice their version five to seven times. After they share their version, they will watch everyone on the team deliver their own. They will most likely watch each one a few times. Everyone will help each other be better.

Onboarding

The process of training and onboarding salespeople and new employees is still broken. Even with all the technology and automation we have in the world, for many companies, sales attainment and new-hire ramp time are not improving. New hires at some B2B companies take over a year to start hitting quota. We see the average time to ramp a new rep to be over 270 days before using SalesHood and fewer than 90 days after using our technology. CSO Insights validates the number with 40.2 percent of their survey respondents reporting ramp-up time of greater than ten months. We also don't talk a lot about all the salespeople that don't make it. Those numbers are high too.

The reason for this industry-wide miss is we're not looking at onboarding as a journey. Rather, we look at it as an event at one point in time, like a boot camp that starts and ends during the employee's first week of work.

We're not highlighting top performer best practices. We're not providing structured learning paths and embracing learn-by-doing principles. We tend to miss the ever-so-important peer feedback and mentorship. We don't do enough expectation setting around practice and coaching. Last, and probably the most important, is that we don't do enough to get alignment and clarity around the performance metrics that matter at every step in the onboarding journey by role.

Getting sales teams performing better and faster is the way to quickly grow business. It's how we did it at Salesforce, and it's one of the most important initiatives for young startups. The first step to creating a scalable, revenue-generating sales onboarding plan is to align on metrics. We all want to front-end the process with metrics that help sales to focus on the right behaviors and actions. For example, we want to measure pipeline generated, time to first deal, and time to quota attainment. We should create onboarding that blends self-paced work with certifications, team-based exercises, and role plays. The following best-practice onboarding story will help you build learning paths that will reduce time to ramp and make you a revenue superstar contributor in your company.

The Telogis-Verizon Story

At our 2016 annual customer conference, Kelly Frey, vice president of marketing at Telogis, presented a talk on the importance of aligning marketing and sales to improve sales productivity. He talked about his journey and how he and his team, over time, created a lot of content and knowledge. He brought a great chart showing the considerable growth of content creation and content consumption month over month. We'd all like to show a similar chart when presenting our enablement results.

Kelly explained that what we were looking at was the collective knowledge created at Telogis. He explained that the content represented a lot of different types of knowledge from a variety of groups: marketing-generated content in the form of corporate presentations; content generated by product management and engineering in the form of product knowledge;

content generated by subject-matter experts from weekly company calls that are recorded and shared; user-generated content from individual contributors like salespeople; executive-generated content, including business plans and quarterly goals; and customer-generated content from customer interviews and stories. Kelly then said that the sum total of this content is what makes his company who they are. He said that it was bigger than their culture, that it was their secret sauce.

The metrics Kelly highlighted focused on attainment and time to revenue, the key performance indicators that are the biggest sign of success for Kelly and Telogis. "My ultimate key performance indicator at Telogis is to help sales sell bigger deals faster," he said. At Telogis, they improved time to first deal by 70 percent. They reduced the average number of days from 266 to 85. The business benefits are extremely positive and the dream of many enablement professionals.

Another metric that Kelly measured is the percentage of a cohort that achieved their first deal in six months. They went from zero to 70 percent. Their leadership team recognized how amazing this sales productivity number was to the company and ultimately to one of the factors that led to the acquisition by Verizon.

I love this quote from Kelly: "We could close deals faster and bigger than our competition." What sales leader, salesperson, sales manager, or chief executive officer does not want this too?

Telogis Onboarding Framework

I interviewed Kelly Frey, and we talked about the onboarding framework at Telogis. He shared that there is a four-week learning path for enterprise sales executives. These are

experienced sales professionals, so the learning path needs to include an appropriate amount of learning, coaching, and best-practice sharing.

The first week is focused on "How We Win." The second week is themed around "What We Sell" with an emphasis on products and solutions. The third week, called "Who Do We Sell To," is focused on personas. Finally, the fourth week is focused on "How Do We Close." At the end of each week, there is a pitch contest to practice and reinforce learning. He also encourages his people to tell the company story in a one-minute elevator pitch.

The learning path includes both self-paced learning and group learning. The new hires are constantly evaluated and provided feedback and tips. The learning path is comprehensive and achievable with about seven hours of work a week over a month. Kelly said: "The learning path is a reasonable amount of time because our salespeople are hungry in the early days and eager to understand the products, verticals, competition, and success stories."

Company-Wide Onboarding

In 2017, we ran our third-annual SalesHood customer conference. We invited our customers to speak at our event. The topics ranged from sales operations and sales enablement to sales management. The agenda and conversation were shaping up nicely. One of our keynotes was a talk by Kamal Ahluwalia, the chief revenue officer, and Aaron Farley, head of enablement from Apttus. What struck me as different from previous sales talks was Kamal and Aaron's emphasis on enablement and learning being a company-wide initiative. Every single employee would

go through new hire-training together, including twenty hours of prework and a boot camp, regardless of role. Training would be for everyone, not just salespeople.

New hires were asked to record their own company pitch presentation. Expectations were set that there needed to be some understanding of the value proposition. Apttus wanted everyone at their company to be on message and speaking the same language. They initially ran the all-employee corporate pitch certification as an experiment. The non-salespeople were nervous and anxious. Apttus challenged their new employees and got every employee to raise their game.

The long-term impact was far-reaching. Besides improvements in productivity, there were also implications to culture. Going forward, when employees were asked to do things, they were ready. Non-sales employees were appreciative and grateful. They thanked Aaron for helping them understand how their jobs impacted the broader company health. One of my favorite quotes from Aaron's talk is "Apttus helps its employees more confidently talk about what they do and be able to sit down with their mom and explain it too." That's powerful.

The Apttus story continues with company-wide enablement across every role and every employee. Kamal, now President at Eightfold.ai, has carried his conviction around enablement into his new venture and turned it into a foundation block—not something that's brought in later. We proved that enablement done right is a sought-after business strategy for every company, division, leader, and manager.

Onboarding Checklist

A thorough onboarding plan is developed to increase the likelihood of hitting quota much faster through enablement and

onboarding. What goes into a 30-60-90-day sales onboarding plan? How should it be structured? How does peer mentoring play a part? How are managers engaged? How is the sales process introduced and learned? How often do check-ins happen? What are the right kinds of certifications?

As you think about your 30-60-90-day sales onboarding plan, here is a checklist you can use to onboard your sales teams:

1. Include ten to twenty hours of prework before joining an in-person boot camp.
2. Keep videos short and concise, using talking heads instead of slides as much as possible.
3. Organize the flow of content and exercises to map to the sales process.
4. Host check-ins weekly in the first thirty days and then every two weeks thereafter.
5. Keep managers engaged with regular updates and rep performance scorecards.
6. Create onboarding plans by employee role.

There is a lot you can automate with new-hire onboarding, and there are some parts that need human interaction. Make sure you are striking the right balance. Also, be sure to include the learning and content pillars proven to get teams up to speed and productive faster.

Company Story, Culture, and Values

Create a rich library of videos and stories that cover company story, culture, and values. I recommend asking senior executives and top performers to share their stories and experiences.

It's a great way to get people introduced to your company. This should happen at the beginning of the sales onboarding plan.

Customer Stories

Include examples of reference customers by industry, product, segment, and geography. Make the stories short and filled with memorable details salespeople can use in their prospecting and customer conversations. The customer stories will be inspirational and aspirational for new hires. It's always better when our new hires hear from our customers as well as hear what customer success looks like.

Sales Process

Map out exercises, discussions, role play, and teamwork around the sales process and sales stages. Sequence the stages in order, and stage exercises that are mapped to real account, prospect, and customer outreach. Having new hires go through the motions together with real accounts is the ideal way to do this. Here is a list of common stages and sales onboarding work that would be good for new hires to do as a group and with their managers and mentors:

- Stage 1: Research companies and contacts. Send emails.
- Stage 2: Write out qualification and discovery questions.
- Stage 3: Create a customized presentation and practice presenting. Get feedback from peers and manager.
- Stage 4: Create a proposal with pricing and solution details.
- Stage 5: Map out the procurement process for a real deal and prepare commercials.

Product Training

Provide product training in phases. Don't overwhelm and firehose your teams. Do product overviews and introductory videos. More hands-on training should come later. Focus on competence and confidence. You should target product fluency instead of expecting product mastery in the first few weeks. Put your subject-matter experts and product managers in front of the camera to share their product vision and story. They'll appreciate doing it once but not every time you hire new people.

Certifications and Assessment

Create short certifications and assessment that are mapped to the sales process and sales stages. These are also called stand and deliver exercises. Certify your team on the elevator pitch, the corporate overview, first meeting presentation, second meeting presentation, and all conversations that move deals through the buyer's journey. Objection handling is another common certification. Make certification relevant and as real to life as you can. Think about your new hire's journey and schedule the right certification at the right time. For example, don't certify someone on processing an order if you don't expect them to need to know that skill until several weeks after their start date.

Experts to Meet

Create lists of experts, executives, and top performers whom it would be helpful to meet. It takes a village, and building a network is the way to increase ramp time. While you can automate a lot of the onboarding, the human connection is important. Create time for new hires to meet experts in groups or in one-on-ones.

Call Shadowing

Curate mentorship and call shadowing. Make it mandatory that new hires reach out to as many sales peers as possible to call shadow. Put them on a schedule and hold them accountable. They should report back what they observed and how they'll apply the lessons learned in their own territory and deals. Their observations will be telling about what future coaching is required.

Call Coaching

After they've sat through their quota of shadow calls, salespeople should be shadowed as they graduate to leading their own customer calls. Focus on the fundamentals and make sure they are being curious and conducting discovery and relationship building the right way.

Check-ins

Keep a schedule of check-ins. Sixty minutes a week will go a long way in helping a new hire feel they have a support network around them, but check-ins are often overlooked. Give them an opportunity to ask questions and hear from their peers.

The sales onboarding plan's goal is to establish a clear set of expectations and actions for sales managers and reps to do together to hit quota faster.

Building Content

You don't have to feel as though you alone are responsible for building all the content. You can't do it alone. It takes a team. You need to engage all your subject-matter experts, product managers, sales managers, and leaders to build a rich

library of crowdsourced content. Don't wait until boot camp to get your new hires introduced to deal-win stories, executive interviews, and top customer presentations. Crowdsource the stories and pitches and make them available to your teams the moment after they sign your offer letter. Engage subject-matter experts and product managers to use video to capture their knowledge and scale the distribution of it.

You're a lot closer than you think. Crowdsource deal wins. Crowdsource customer stories. Crowdsource top-performer territory plans, email templates, and account plans. Collate the top customer presentations from your top performers. Organize the content and make it available to your teams. Have a vision in mind and create a phased approach to content development that delivers value to new hires and the bottom line faster.

The goal with onboarding should be to help teams put points on the board as quickly as possible while reducing the need for long on-site boot camps. Those are expensive and aren't conducive for quality learning and retention. Start thinking about onboarding as a thirty-day virtual journey with prework, mentorship, and milestones instead of a one-week intensive boot camp experience.

Use new-hire onboarding to build a stand and deliver learning culture. Many companies put emphasis on a single stand and deliver certification event. That doesn't work well. Follow what the best companies do and create micro-certifications. Have salespeople stand and deliver simulated role plays for elevator pitches, customer storytelling, objection handling, and product demonstrations. Have the final stand and deliver certification be a customer presentation based on a real customer deal.

Make onboarding a company-wide activity with product managers and subject-matter experts creating content and managers and leaders coaching and mentoring.

Virtual Reality and Learning

We hosted a virtual reality experience in New York, and it opened my eyes to the future. It's amazing how far virtual reality has come. After trying out several virtual reality experiences, like walking through landscapes on this planet and abroad, walking the plank (and jumping), and then flying through the skies, I realized its power. As different experiences and scenarios presented themselves to me, I was asked to participate and go deeper and deeper. It took practice and role-playing to the next level for me. Did I mention I'm afraid of heights, yet I was willing to walk on a plank and jump off a building. What an amazing way to get over fears, uncertainty, and doubt.

The implications of these sort of experiences are tremendous for corporations, especially around training, coaching, and selling. We can leapfrog engagement and education hurdles by immersing our teams and customers into virtual reality role-play simulations. With virtual reality, we'll see salespeople practicing their pitch in a simulated boardroom and with customers raising objections in augmented conversations.

KEY TAKEAWAYS

It is easy to take the passive way of learning and not creatively come up with ways for employees to learn and share best

practices. Be creative with your training content and learning exercises, and watch your people be creative with their learning.

- Integrate active-learning methods in training curriculum, such as icebreakers, storytelling, team discussions, role plays, and stand and deliver presentations.
- Embracing active-learning methods results in better learning retention and better business outcomes.
- Map learning outcomes with active learning methods.

About the Author

Elay Cohen is the CEO and cofounder of SalesHood. He is the former senior vice president of sales productivity at Salesforce. Elay was recognized as the "2011 Top Executive" by Marc Benioff and credited for creating and executing all of Salesforce's sales training and coaching programs that accelerated its growth from a 500 million-dollar business to an enterprise worth more than 3 billion dollars. The innovative sales training and support delivered over these years by Elay's team to thousands of sales professionals resulted in unprecedented hypergrowth.

Elay authored the book *SalesHood: How Winning Sales Managers Inspire Sales Teams To Succeed*. Elay is a thought leader in the discipline of sales management and is sought after by the most successful CEOs. He is also recognized as a top innovative "Mover and Shaker" in sales leadership by *Entrepreneur* magazine and also recognized by LinkedIn as on of the world's top sales experts.

Elay is on a mission to improve and modernize how companies enable their people. Elay is working closely with the world's most innovative companies and most forward thinking educational institutions. Together, they are changing the future of work.