

SALES ENABLEMENT PILLAR ONBOARDING



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. Crowdfund 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. Crowdfund deal wins. Crowdfund customer stories. Crowdfund 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.