

Sales Person Onboarding Best Practices

The business case for onboarding and how to implement it as a strategy to drive sales performance

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The New Sales Person Metamorphosis – From Rainmaker to Flub

Today is a fantastic day at ABC Industries! For the last month, they have aggressively courted Brett Wilson, a hot sales candidate, to join their sales team. Today, he accepted the offer. The recruiter and sales manager share “high-fives.” Mission accomplished! The job is done! The hard work is over. The competition was fierce for Brett, but ABC Industries was victorious.

While they celebrated, Brett resigned his position with his current employer and enjoyed his own celebratory dinner with his wife. That night, he lay in bed wondering if he had made the right decision. With fingers crossed, he looked forward to his first day at the company. “I’m fired up to show them that I am a rock star seller!”



The Unexpected Employee. It’s 8:28am when Brett arrives at ABC Industries ready for his first day. He’s excited, but also a bit apprehensive. Brett walks into the office, puts on a big smile and introduces himself to the receptionist. “Hi, I’m Brett Wilson, your new sales person.” Looking puzzled, the receptionist responds, “New sales person? I didn’t know we hired a new sales person. Hang on a minute.” Brett brushes this off as it is not uncommon for the receptionist to be out of the loop when a new employee joins a company. She calls several managers, but no one knows what to do with Brett. He sits in the lobby as person after person walks by without saying a word to him.

Finally, at 9:10am, Jack, Brett’s new sales manager, walks in carrying a Starbucks coffee. He greets Brett in the lobby and takes him to his cubicle. “I’ll stop by later and check on you,” Jack says as he hurries off. As Brett begins getting settled in his cubicle, he wonders if he is in the wrong place. The cubicle looks as if it belongs to someone else. He opens a desk drawer and finds a moldy sandwich. He opens another drawer and finds the performance improvement plan for the prior cubicle dweller. There’s no laptop on the desk and the phone has the name “Phil” on the screen. All the while, employee after employee walks by, takes a quick glance and continues along. He hears whispers in the hallway. “Who is that guy in Phil’s cubicle?” Yet, no one dares to step in and greet him.

Brett would love to get a cup of coffee, but has no idea where to get it. He also needs to use the bathroom, but doesn’t know where it’s located. The rest of Brett’s day continues much like this. During his drive home, his wife calls asking how his first day went. Needless to say, Brett was not impressed by the experience. “Tomorrow will be better ... I hope.”

First thing the next day, Brett is met by Jack. He had not seen Jack since being shown to his cubicle the prior day. “We’re so excited that you are here. You are the key to us blowing out our revenue target for the year,” Jack says as he hands Brett a stack of papers. “Read through this information and you will be ready to sell tomorrow.” Brett spends the rest of the day reading through the documents and taking copious notes.

On day three, Jack greets Brett with a stack of leads and says, “You’re ready! Here are a bunch of prospects. Now go sell!” While Brett had read every word of the “training course” he had been given, he doesn’t feel prepared to sell ABC’s product line. Nevertheless, he gives it a shot.



Trouble Ahead! Brett’s first month with the company does not go very well. On the last day of the month, Jack calls him into his office to discuss the results. “Tough month... I’m sure you will do better next month. Just try harder and you will be fine. Make more calls and the revenue will come.” Brett leaves the meeting determined to show the company that he is the rock star seller they thought they had hired.

Following the pep talk, Brett spends the next month back on the phones chasing deals still with very little success. Jack *invites* Brett for another discussion about performance. “I’m getting concerned, Brett. When we hired you, we thought you were going to be awesome, but it’s not happening. We need to see significant improvement over the next thirty days or ...” Jack didn’t finish the sentence, but Brett knew what he meant. Brett shared Jack’s disappointment. He, too, thought he would be rolling in dough.

During Brett’s third month, he sold a few accounts, but it wasn’t enough to save his job. In what felt like a whirlwind tour, Brett had gone from rock star to dud and was now unemployed. Even though it was the company’s decision to let Brett go, it didn’t matter. The blazing fire in his belly that felt like an inferno when he first joined the company had been doused. He was ready to quit any way.

Whose fault was this disaster?

The Business Case for Sales Person Onboarding

If I had a nickel for every time an executive said to me - “Great news - we just hired our rainmaker! He’s going to be fantastic!” Then, about 3 months later the same executive sings a completely different tune. “Oh man, he’s gone ... he was terrible! He couldn’t sell anything!” - I would be a *gazillionaire*.

Apparently, there is an affliction that causes new hire sales people to change from superstar to bumbling fool. The disease has a ninety-day incubation period before becoming fatal ... to the sales person’s employment. The main cause for the affliction originates with the “great sales person” perception embedded within most executives. This is the flawed belief that you hire great sales people, put your feet up on the desk and the revenue rolls in.



Without a structured onboarding program, the investment in a new sales person is likely to be flushed away.

Assuming that the hiring decision was made based on the match between your ideal sales person profile and the candidate, what you have in front of you is a sales person with potential. However, there is only one way for that potential to become reality - for the sales person to achieve her true potential for the company. That way is through ***sales person onboarding***. In essence, when you add a sales person to your team, the hard work isn’t over, but rather, it’s just beginning for both you and your new sales person.

What Is Onboarding? Taking a step back, let’s define the term “onboarding.” Many see onboarding through the narrow lens of new hire paperwork and orientation. In essence, they define it based on the limited scope of the first day experience. Sure, the first day experience is a key part of onboarding, but it is not the comprehensive plan that ensures success. The true definition of onboarding is more comprehensive. It includes the development plan for the sales person which prepares him to sell effectively for the company.

When you add a sales person to your team, this individual arrives on your doorstep with a portfolio of skills. The required onboarding experience is one designed to quickly help the new seller use those skills in your sales environment - empowering them to perform at optimal levels.

Is “onboarding” a corporate luxury? Not if you consider the economic impact of adding sellers to your team. For starters, highly successful companies never *hire* sales people. At least, that’s not



how they perceive the decision to add headcount to the sales team. Those companies see the decision to add headcount to the sales team as an investment in revenue. Onboarding is seen as a corporate initiative to both protect that investment and ensure a high return on it.

According to a 2011 *CSO Insights* survey (CSOInsights.com), approximately 60% of respondents said that it took over seven months for a new seller to produce at the same level as a tenured one. A quarter of that 60% said that it took over a year to achieve that production level. Note that this doesn't mean that the sales person is profitable to the company at those milestones, but rather just the new sales person produced in a one-month period at the same level as a tenured one.

Highly successful companies perceive adding headcount to the sales team as an investment in revenue, not as hiring sales people.

The Sales Person Profitability Timeline. Consider this... A sales person is added to the team at a base salary of \$40,000 (\$3,333/month). When factoring in the total cost of the sales person to the business (including: overhead, benefits, percentage of sales manager cost, etc.), this sales person represents an annual investment in revenue of \$60,000 (\$5,000/month) to the company.

- If it takes five months for the sales person to generate enough revenue in a single month to cover their monthly salary of \$3,333, the company will have invested **\$16,665** to achieve this milestone. (5 months x \$3,333 salary)
- If it takes ten months for the sales person to generate enough revenue in a single month to cover their monthly cost of \$5,000, the company will have invested **\$50,000** to achieve this milestone. (10 months x \$5,000 cost)

Keep in mind that this only presents a month-by-month analysis and does not represent the cumulative effect of the compounded costs incurred. The cumulative effect is much more financially impactful on the company.

- If it takes eighteen months before the sales person's total revenue matches the total salary paid, the company will have invested **\$59,994** to achieve this milestone. (18 months x \$3,333 salary)
- If it takes twenty-four months before the sales person's total revenue matches the total cost incurred, the company will have invested **\$120,000** to achieve this milestone. (24 months x \$5,000 cost)

If the profit margin on the products sold by the sales person is 10%, the seller needs to generate **\$50,000** in revenue in a single month to cover their \$5,000 per month cost.



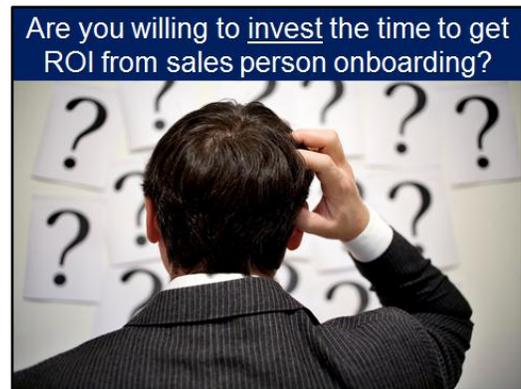
It is important to note that the aforementioned model is based on a salary of \$40,000 and that it took two years to recoup the full cost of that sales person. Many companies pay salaries well beyond that amount, in which case the sales person may not be profitable to the business for three to four years! Try it with your own numbers using the [Sales Person Profitability Calculator](#).

Still think sales person onboarding is a corporate luxury? A well-crafted onboarding program provides several financial benefits for the company:

1. Reduces the upfront investment required to receive a return.
2. Reduces the amount of time it takes for the sales person to generate revenue.
3. Increase sales person proficiency resulting in optimal sales performance.
4. Reduces sales turnover.
5. Provides a recruitment tool to attract top sales talent, particularly those rock star candidates from outside your industry.
6. Increases sales tenure as a foundation for the relationship between the sales people and the company has been established.

Onboarding Roadblocks. The financial justification is staggering. Yet, few companies have taken the steps necessary to leverage *onboarding* as part of their corporate strategy to profitably grow their businesses.

Some companies haven't launched an onboarding initiative because they aren't aware of the financial justification. Without onboarding, these companies continue to "churn and burn" sales people, wait forever for sales performance and incur huge unnecessary costs.



Others have not implemented onboarding because they don't know how to create it. That excuse is about to be eliminated as you continue reading! The onboarding initiative will take time and resources to make it successful; however, there is a strong return on investment.

Note: *Effective onboarding starts with making informed decisions in the hiring process. If you have not already done so, develop your ideal sales person profile such that you can compare and contrast sales talent against it. Onboarding cannot solve the problems associated with poor hiring decisions.*

The First Day Experience

It seemed as if Brett's arrival was a complete surprise to most everyone at ABC Industries. Yet, the sales manager extended the offer and set his start date. How could the company not be prepared for Brett's arrival? More the rule than the exception, companies are not prepared for the arrival of their new sales people. The lack of preparation has the potential to damage the relationship – right on day one!



Everyone remembers his first day on the job whether it was his first out of college or a job change. However, most people probably don't remember their second day. But, they forever remember their first one. That very first day sets the tone for the relationship. Think back, I'll bet you remember your first day with your company - whether it was last year or twenty years ago.

First Day Blunders. I'll share a few of my first day nightmares with you. Several years ago, I was hired to manage the sales organization for a Fortune 1000 company and was called to the president's office on my first day. I was puzzled by the request. When I sat down in her office, she had a very concerned look on her face which made the butterflies flutter in my stomach. She proceeded to say, "There is something I need to tell you." Then, she paused for a moment and continued, "The CFO is sleeping with one of your sales people. I'm telling you this so you don't get blindsided." Needless to say, I never forgot that first day experience.

In another company, I was hired to lead the sales organization. When I showed up on Monday morning, I was greeted by the general manager at the door. He walked me to my office and said, "Well, I'll just let you go to it." However, what I didn't know at the time was that, up until Friday, someone else had been in the role ... in that very office. This occurred before corporate email so no one in the company knew of the leadership change. People kept walking by my office wondering who I was and what happened to the last guy - including my now direct reports. You can't make this stuff up!

There's a common misconception that when a candidate accepts a job offer that he is fully committed. That's not the case at all. Brett hopes he made the right decision, but he is keeping his options open. Don't think for one second that he pulled his resume off the job boards and told recruiters that he is out of play. A key to employee engagement, the first day experience establishes the relationship foundation. The unanswered question is - Will it be set in concrete or quicksand? The choice is yours.

As part of your onboarding program, develop a first day plan that ensures a positive first day experience for your new sales people. Here are some tactics for inclusion in your plan:

First Day Game Plan

- Notify the receptionist so that the new sales person's arrival is expected.
- Make the new seller's office pristine as if it is the first time it's ever been used.
- Have the computer and any other tools ready before the new sales person arrives ... including displaying the correct name on the phone.
- Prepare all of the new hire paperwork so it's ready on day one ... especially the forms that ensure he is paid correctly on payday.
- Assign someone to introduce Brett to the team members and show him around the office (e.g., kitchen, office supplies, restroom, etc.).
- Design an organization chart with photos, titles and brief explanations of each employee's role with the sales team (e.g., Steven David is the Vice President of Marketing. Contact him when you are working on a proposal).
- Have a documented onboarding activity plan waiting on the new sales person's desk.
- Send a welcome email announcing the new sales person's arrival to the company. As George Bradt and Mary Vonnegut say in their book, *Onboarding*, "Design your new employee's experience as you would a client experience. People don't always remember what others said or did. They always remember how they felt."



Remember Phil? He was the sales person who occupied the cubicle before Brett – the one who left the half-eaten sandwich in the drawer. When he left the company, there was a celebratory, farewell luncheon for him. What did the company do for Brett when he arrived? Not a darn thing! Celebrate your sales people on the way into the company, when anything is possible ... not on the way out. Nothing productive comes from celebrating a terminated employee.

Defining Sales Person Onboarding Objectives

With the first day experience planned, the next step is to design a program that gets new sellers up to speed ... fast. After all, every minute the sales person is on the bench, unable to sell for the company, she is a liability on the books.

Most companies handle sales person onboarding in one of two ways.

Phone Book Onboarding - hand the new sales person the phone book, give him a “kiss,” and send him off to sell something to someone.

Fire Hose Onboarding - drown the new sales person in content for a week and send her on her way to sell the value of the products.

Neither of these approaches is effective in protecting the investment made in your new sales person. Both of these onboarding approaches yield the same results: high sales turnover, underperforming sellers and a constant mantra of “I need a lower price to get the deal done ...” because they lack the proficiency to sell the value of the offering. What’s needed is a structured onboarding program that empowers the new sellers to quickly and effectively leverage their skills in the sales role for your company.

So, just gather content and you have an effective onboarding program, right? While this may seem like the logical next step, the approach is flawed. How can you develop onboarding that is focused on sales person development when the objectives haven’t been defined?

To design an effective onboarding program, start at the end. In other words, imagine your new sales person has successfully completed your onboarding program. Since this person has *successfully* completed the onboarding program, the company now has **expectations** of this individual. What are those expectations? Three words will help to define the objectives for your onboarding initiative: **KNOW – DO – USE**. What does the company expect this sales person to *KNOW*, *DO* and *USE* when he has successfully completed onboarding? In essence, your proficiency expectations drive onboarding content development, not the other way around.





KNOW

DO

USE

KNOW refers to information such as product knowledge, the competitive landscape or territory.

DO refers to action such as conducting a sales call, delivering the corporate presentation or demonstrating the product.

USE refers to tools and systems such as a CRM, ordering system or web-based tool.

Below are the common proficiency expectations that executives have of sales people who have successfully completed their onboarding programs to help you get started in identifying yours.

KNOW	
✓ Who's who in the company	✓ Implementation process
✓ Key roles and responsibilities	✓ Client support process
✓ Company history	✓ Client pricing mechanics
✓ Organizational structure	✓ Client visit procedures
✓ Key clients and case studies	✓ Billing policies and procedures
✓ Go-to-market strategy	✓ Sales compensation and mechanics
✓ Product features and benefits	✓ Health insurance and employee benefits
✓ Industry	✓ Expense policies and procedures
✓ Competitors	✓ Travel policies and procedures
✓ Market position	✓ Sales collateral material for prospects
✓ Ideal client profile	✓ Operations policies and procedures
✓ Sales strategy and process	✓ Style guide for written communication
✓ Request for proposal procedures	✓ Social media policies

DO	
✓ Set-up email and signature	✓ Develop prospect pricing
✓ Set-up phone and voicemail	✓ Conduct a client visit at Corporate
✓ Order business cards and supplies	✓ Implement a new client
✓ Deliver a company sound-byte	✓ Execute the corporate sales process
✓ Generate leads	✓ Handle prospect objections/concerns
✓ Schedule a prospect meeting	✓ Prepare an expense report
✓ Strategically analyze an account	✓ Book travel
✓ Conduct a prospect needs analysis meeting	✓ Prepare activity reports
✓ Correlate prospect needs with a solution	✓ Forecast deals in the sales pipeline
✓ Modify the corporate presentation	✓ Upsell an existing client
✓ Deliver the corporate presentation	✓ Reserve resources (rooms, projectors, etc.)
✓ Create a proposal	✓ Conduct a client business review
✓ Research clients/prospects online	✓ Respond to a Request for Proposal (RFP)



USE	
✓ Phone system	✓ CRM
✓ Email system	✓ Pricing tools
✓ Copier	✓ Ordering system
✓ Fax machine	✓ Intranet site
✓ Web meeting tool	✓ Operations system

While one person may be tasked with managing the onboarding initiative, the construction process should be a collaborative exercise including: peers, superiors, veteran sales people and anyone else in the company who can offer valuable insight. This ensures everyone is on the same page and prepares you to create an outstanding onboarding experience.

The Common Onboarding Development Mistake. Once you have team consensus on the expectations, the next step is to develop an onboarding program for your new sales people. *Oops!* I just made the same mistake that most companies make when developing onboarding. I erroneously referred to “onboarding” in the singular form... “an onboarding program.” Oftentimes sales leaders tell me, “Every sales person we hire goes through the exact same program.” And, they are proud of this approach.

While these sales leaders should be commended for recognizing that new sales people need help to achieve their potential, having a one-size-fits-all onboarding strategy is a short-sighted approach.

Sales people arrive at a company with several potential backgrounds and expertise:

1. Within the industry
2. Outside the industry
3. From within the company
4. Just out of school

One size doesn't fit all when it comes to onboarding. Given the various backgrounds of the new sales people, several onboarding programs are needed to ensure the expectations are met.

While the proficiency expectations of a seller who has successfully completed onboarding doesn't change, the program needed to ensure those are met must vary to accommodate for the various backgrounds. The onboarding finish line (*expectations*) remains the same, but the roadmap to get sellers to that point varies based on the needs of the individual. Some examples of the need to have multiple onboarding paths include:



- The *new seller from within the industry* probably doesn't need the industry basics during onboarding, but needs development in the nuances and advantages of your company's offerings.
- The *new seller from outside the industry* needs onboarding to start with the industry basics, but probably has strong sales skills to build upon.
- The *internal transfer* to the sales team probably knows all of the intricacies of the company, but needs Sales 101 as a cornerstone of onboarding.
- The *seller just out of school* needs a comprehensive onboarding program that addresses both the industry insight and sales skills.

In this case, four different onboarding programs are needed to address the backgrounds of those who would be placed in those selling roles to ensure they can meet corporate expectations. With the understanding that several onboarding programs are needed, the questions to ask for each expectation are:

1. What development initiatives are needed for each expectation to be met?

If you have set an expectation that the sales person should be able to adeptly conduct a sales call immediately following onboarding, keeping your fingers crossed won't get it done. Document the development initiatives that lead to the expectation being met. In this case, the seller needs development in: the product offerings, sales process, competitive landscape, etc. to skillfully conduct the sales call.

Not everything has to be mastered by the sales people during their first week with the company. Develop a timeline for proficiency expectations and structure the onboarding programs accordingly.

Structure the program so the content builds each day/week and is continuously reinforced. While it would be ideal if a sales person could effectively sell after just a few days of onboarding, this is rarely the case. Position your new sales person such that she develops the expertise you expect for peak performance.

2. When does each expectation need to be met?

Don't make the "fire hose" onboarding mistake of crunching all of the content into a short window of time. If you do, you will find that the onboarding program participants don't retain the information making the experience a waste of time and resources. Remember, sales people don't need to master everything during their first week. Identify when each expectation needs to be met during their employment tenure.

Assessing Proficiency of Onboarding Participants

When the onboarding program is completed, it's time for the sales person to demonstrate proficiency. The onboarding initiative represents an investment in revenue just like adding headcount to the team. The next step is to determine what evaluation techniques to put in place such that the new sales person can “show her stuff.”

Written Exam – A written exam is a great way to test knowledge of policies, processes, product knowledge, competition, etc. It shows retention of the subject matter. Keep in mind that there is a science to writing test questions. Before you put your exam into practice with your new sellers, ask your veteran sales people to take it. Ask for honest feedback and look for opportunities to improve the verbiage.

Sales Call Simulation – Not sure if your new sales person is ready to call on a CFO? Create a simulated sales call whereby he conducts one within the confines of your offices. When sales people are ineffective calling on executives, not only don't they sell, but they tarnish your brand. A simulated sales call is a great way to ensure your sales person is “game ready.”



To put this into practice, write a sales scenario for the exercise. Provide the sales person with the same level of information that he would have if this were an actual prospect situation. Obviously, the sales person can't research a fictitious company so you need to provide that information.

Select someone on your team to play the role of CFO for the exercise and create his character. When defining the role, be sure to address the following:

- Setting his demeanor for the call – friendly or difficult
- Identifying the challenges the “company” is experiencing
- Documenting the ideas and solutions to which he will be receptive
- How the “CFO” should end the call with the sales person

Next, you need a few evaluators. They should sit behind the sales person during the simulated sales call so they are not a distraction. As you can imagine, if the sales person sees the evaluators taking notes, it will throw off his concentration.



The evaluators should be coached on what to look for and measure during the exercise. It is best to provide them with a score sheet that identifies the expectations. Consider a two-part scoring module in which one part measures *style* and the other measures *technique*. While the score sheet will differ for each organization based on its specific sales person expectations, below is a sample to give you some ideas to get started.

Simulated Sales Call Score Sheet

Style	0	1	2	3	4	5
1. Accurate	<input type="checkbox"/>					
2. Comprehensive	<input type="checkbox"/>					
3. Creative	<input type="checkbox"/>					
4. Engaging	<input type="checkbox"/>					
5. Clear	<input type="checkbox"/>					
6. Confident	<input type="checkbox"/>					
7. Articulate	<input type="checkbox"/>					
8. Passionate	<input type="checkbox"/>					
9. Personable	<input type="checkbox"/>					
10. Credible	<input type="checkbox"/>					

Total Score: _____/50



Technique	0	1	2	3	4	5
1. Confirmed time allotted for meeting	<input type="checkbox"/>					
2. Proposed agenda	<input type="checkbox"/>					
3. Identified challenges	<input type="checkbox"/>					
4. Probed interest in addressing challenges	<input type="checkbox"/>					
5. Positioned solutions relative to challenges	<input type="checkbox"/>					
6. Identified decision process	<input type="checkbox"/>					
7. Identified decision time frame	<input type="checkbox"/>					
8. Identified decision influencers	<input type="checkbox"/>					
9. Handled concerns	<input type="checkbox"/>					
10. Defined next steps	<input type="checkbox"/>					

Total Score: _____/50



Group Presentation Simulation – If, as part of your sales process, sales people conduct group presentations, you may want to incorporate a simulated group presentation into the proficiency evaluation process. Building off the simulated sales call, create a group presentation scenario that includes several people. Each one should have a scripted character, similar to the process when defining one for the simulated sales call.

The score sheet for this exercise should also be divided into two parts: *style* and *technique*. The same *style* section for the simulated sales call also can be used for this exercise. The *technique* section should change given the nature of this session. A sample of the *technique* section of the score sheet for group presentations is provided below.

Simulated Group Presentation Score Sheet

Technique	0	1	2	3	4	5
1. Confirmed time allotted for presentation	<input type="checkbox"/>					
2. Facilitated participant introduction	<input type="checkbox"/>					
3. Captured participant goals	<input type="checkbox"/>					
4. Incorporated participant goals into presentation	<input type="checkbox"/>					
5. Proposed agenda	<input type="checkbox"/>					
6. Incorporated sales call information into presentation	<input type="checkbox"/>					
7. Delivered presentation interactively and engaged participants	<input type="checkbox"/>					
8. Demonstrated active listening	<input type="checkbox"/>					
9. Handled concerns	<input type="checkbox"/>					
10. Defined next steps	<input type="checkbox"/>					

Total Score: _____/50

CRM Practical – CRMs can provide wonderful insight into sales activities and trends, but they only work if data is inserted correctly and comprehensively into the system’s fields. It’s best to test proficiency on the use of this system immediately following completion of onboarding, rather than try to fix bad habits later.

Depending on how you use your CRM, consider the following for inclusion in your CRM proficiency evaluation.

- Create an account
- Assign a person to an account
- Create a task
- Complete a task
- Insert an account note
- Forecast a deal
- Complete a sale



Sales Business Plan – Through onboarding, you’ve immersed the new sales person in your selling culture and environment. You’ve taught him your methodology and shared best practices. At the conclusion of onboarding, consider having the new sales person submit a sales business plan in which he communicates his success plan.

If you give the sales person a blank sheet of paper on which to submit the plan, you will not be pleased with the results. When making the request, provide a series of questions to be addressed in the plan including:

- How will you determine which accounts to pursue and when?
- How will you generate leads?
- What will be your approach to book a prospect meeting?
- How will you differentiate our offering?
- What metrics will you use to keep yourself on track?
- What will you do to continually enhance your knowledge and skills?



For each of these proficiency measurement tools, a pass/fail score should be set. That's the easy part. The more challenging one is determining the action you will take if the new seller fails. If your onboarding initiative is still in its infancy, you may want to take coaching and development steps with the sales people who do not pass rather than fire them. Once the program and exams have matured, you can take more aggressive action.

Measuring Sales Person Onboarding Results

Onboarding isn't a static initiative, but rather an evolving continuum. As the company changes, the market evolves and new products are released, onboarding has to mature as well. Also, each onboarding participant has undergone an experience from which he can provide feedback to help you improve it for future participants.



To gather the feedback, conduct a survey of each onboarding participant so you know how to best enhance the experience and improve your results. Some survey questions to consider include:

- What recommendations do you have to improve the onboarding experience?
- Did you feel the program prepared you for the proficiency exams?
- How did you feel about the pace of the program?
- How confident do you feel in your ability to sell for our company?

Inspect What You Expect. As with any corporate initiative, measure and monitor performance of the onboarding initiative to ensure it is yielding the expected results. Measurements to contrast to current performance include:

- Start date to first sale – shortened
- Number of sales in first year of employment – higher
- Sales pipeline for second year of employment – higher
- Effectiveness in selling the full suite of products – higher
- Employment turnover within a seller's first year – reduced

Key Sales Person Onboarding Takeaways

- ✓ Effective onboarding starts by making informed decisions in the hiring process which means developing an ideal sales person profile and contrasting sales talent against it.
- ✓ The myth of the “great sales person” causes companies to ignore onboarding and rely on the skill set of the seller. As a result, these companies experience high turnover and low performance from their sales team. Sales people need a *bridge* connecting their expertise with the sales role in your company. That “bridge” is onboarding.
- ✓ Top performing companies don’t perceive adding headcount to their sales team as “hiring.” They see it as an investment in revenue. Onboarding, not only protects the investment, but it also ensures a higher rate of return. While most executives think of the sales team as their source of revenue, it is also a major cost to the business. Reducing ramp-up time through onboarding reduces the upfront cost associated with getting new sales people up to speed.
- ✓ Everyone remembers his first day on the job. Make sure the one you create for your new sales people is a positive memory. The first day serves as a foundation for the relationship. Will it be made in cement or quicksand?
- ✓ When creating onboarding content, start with the end in mind. Document the expectations you will have of those sales people who have successfully completed your onboarding program. Structure the program to ensure all of the expectations can be met.
- ✓ The most effective sales person onboarding initiatives are collaborative in nature. One person should lead the charge, but a team should be involved in the onboarding development process. Consider having representation from each of the corporate departments involved (e.g., human resources, operations, finance, marketing, legal, etc.).
- ✓ Having ***an*** onboarding program is a mistake! Given the various backgrounds of the sales people hired (i.e., within the industry, outside the industry, just out of school, etc.), several onboarding programs are needed to ensure the corporate expectations are met. The onboarding finish line doesn’t change, but the path to lead the new sellers to that point does.





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- ✓ At the end of onboarding, include an evaluation segment to assess the performance of those who have completed the program. This can come in the form of a written exam, sales call or group presentation simulation, sales business plan and/or CRM practical. In essence, it's the opportunity for the sales person to demonstrate the ability to apply his skills in your sales environment.
 - ✓ Conduct a survey of the onboarding participants to get the feedback you need to continually improve and enhance onboarding.
 - ✓ While your goal may be to create an award-winning onboarding experience that is the envy of the industry, the reality may be that you don't have the resources to do it. Your other option isn't *doing nothing* to onboard your sales people. Those are merely two ends of the onboarding spectrum. Every step you take toward effectively onboarding your new sales people positively impacts both the top and bottom line. Start with a core program and enhance it as time and resources permit.



Lee B. Salz is a leading sales management strategist and talent management expert specializing in helping companies build scalable, high-performance sales organizations through hiring the right sales people, effectively onboarding them, and aligning their sales activities with business objectives through process, metrics and compensation. He is the Founder and CEO of [Sales Architects](#), [Business Expert Webinars](#) and [The Revenue Accelerator](#). Lee has authored several books including the award-winning book *Soar Despite Your Dodo Sales Manager* and is the host of the *Sales Management Minute*. He is a results-driven sales management consultant and a passionate, dynamic speaker. Lee can be reached at lsalz@salesarchitects.net or 763.416.4321



Don't Leave the Success of Your *New Hire Sales People* To a Roll of the Dice!

You go through an exhaustive process when scrutinizing and evaluating sales talent in search of great sales people to add to your team. The new rainmakers accept the job offers and now the real work begins ... for both of you. The new sales people arrive with a toolbox loaded with skills. Yet, how will you get them up to speed to sell for your company?



"They're great sales people! That's why we hired them."

Sure, they have strong sales skills, but that alone doesn't position them for success on your sales team. They need a bridge that connects their skills with the sales roles in your company - empowering them to reach their true potential. That bridge is your *sales person onboarding program*.

"Why does it take forever for our new sellers to bring in sales?"

You hired sales people, not entrepreneurs. Most don't have the ability to figure it out on their own. When a structured sales person onboarding program is not in place, you create a high risk of new hire failure. Remember, adding headcount to your sales team represents a significant corporate investment in revenue. That investment needs to be managed wisely for you to receive a return on it.

The Revenue Accelerator™ is a sales learning management system designed to help companies of all sizes and industries protect their new hire investment through *sales person onboarding*.

- Reduce new sales person ramp-up time
- Increase seller performance
- Reduce sales turnover
- Build employee engagement
- Attract top sales talent to your company

From within the system, you can:

- Define onboarding objectives using our specialized methodology
- Create content to ensure objectives are met
- Write exams that give you visibility into sales person proficiency
- Design surveys to get feedback on the onboarding experience
- Manage participant performance through email notifications and dashboards

Learn more at TheRevenueAccelerator.com.