

Ebook

How to Design a  
**Sales Onboarding  
Program**  
for  
**Faster Ramp**



## Table Of Contents

Why Sales Onboarding Matters	2
Who Wants a Piece of Onboarding?	3
How Can We Make Onboarding Better?	5
Understanding the Sales Onboarding J-Curve	7
Scenarios: The Math and ROI of Better Onboarding	11
How to Design a Great Onboarding Program	12
When They're Hired	12
When They Start to Worry	14
Getting Through the Valley of Doubt	15
After Hitting First Deal	17
Hitting Quota Quickly	18
Conclusion: Visualizing Better Sales Onboarding	20
About LevelJump Software	21

## Why Sales Onboarding Matters

When it comes to sales onboarding programs, companies are surprised when a one-week bootcamp doesn't produce quota-crushing reps.

According to [CSO Insights](#), onboarding is one of seven transformation projects to consider for 2019. They say, "Sales organizations with effective onboarding are gaining two or more months of full productivity for every new hire. How recently have you updated your onboarding program? How are you measuring its success?"

According to [2018 research](#) on the performance impact of onboarding programs, CSO Insights found:

- Effective onboarding services can improve quota attainment by 17%
- Effective onboarding programs can speed up the ramp-time to full productivity by 18%
- Ineffective onboarding services increase your voluntary turnover rate 79%

According to another study by the [Bridge Group](#), **41% of respondents say their average ramp time is over five months**. That means the sales bootcamp, on its own, doesn't work!

Ramping new reps is still a challenge today. At [LevelJump](#), we want to understand why.

In this ebook, we dive deeper into the challenges organizations face with onboarding new reps, the upside of ramping faster, and examples of onboarding programs templates you can use today.

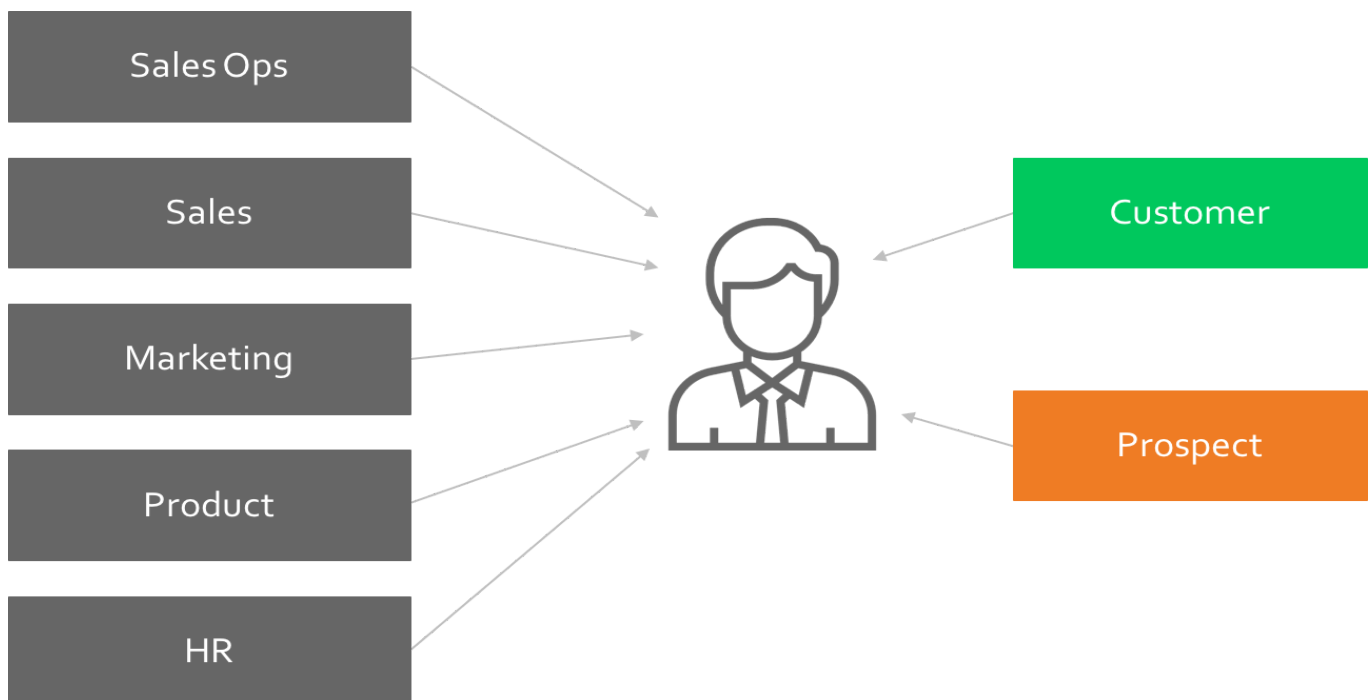
## Who Wants a Piece of Onboarding?

From the conversations we've had with sales enablers and leaders, it's clear that reps are given too much information, too quickly, when they first start a new role or a new job.

The sales rep needs to be buyer-centric. They're being asked for information every day from prospects and customers, some which conflicts with the information your company is teaching them.

Then, you have the different departments that are jumping to share as much information as they can about how things work:

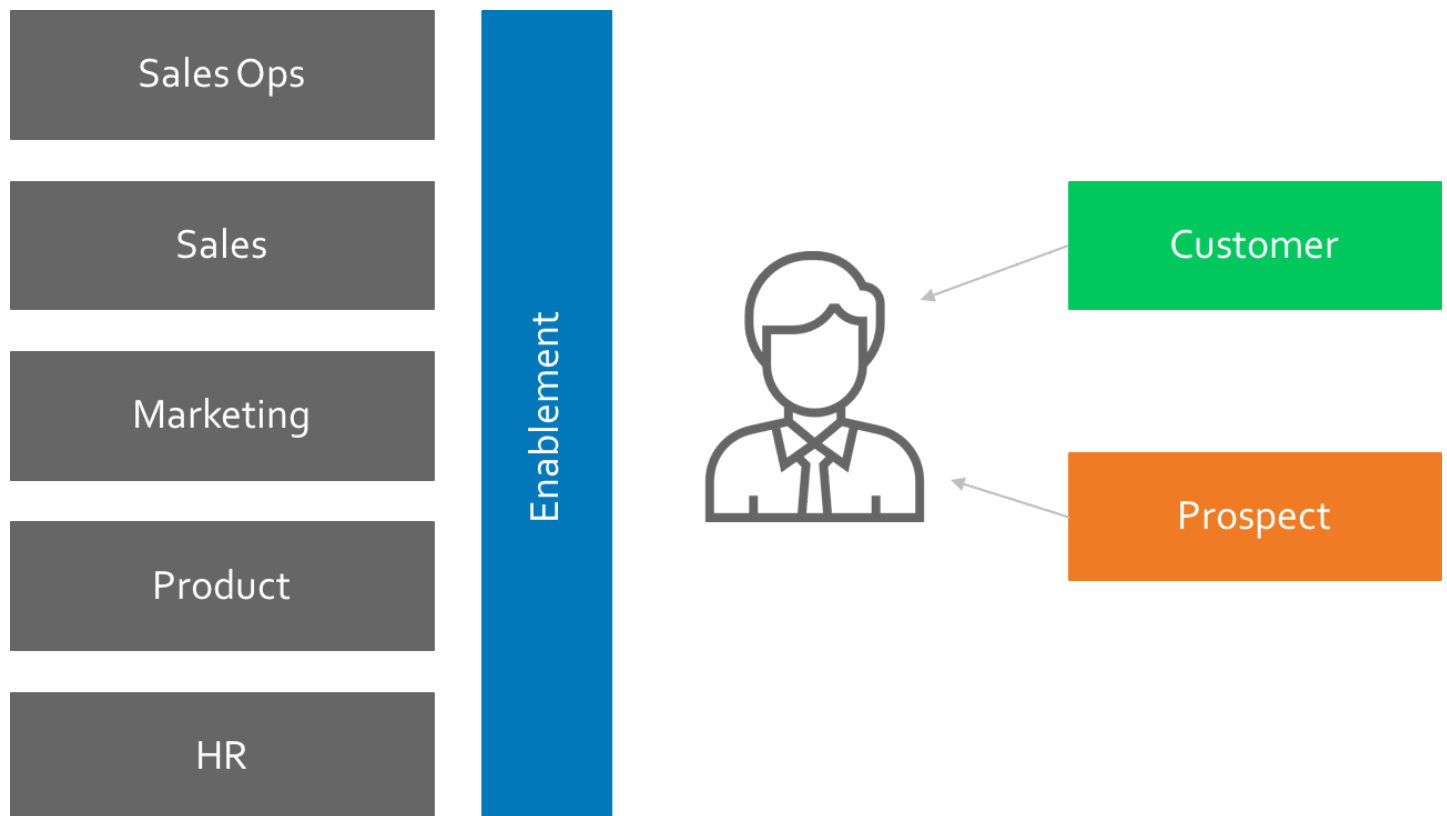
- **Sales Operations:** Here are all the awesome tools you need to use.
- **Sales Management:** Here's the sales process.
- **Marketing:** Here's our latest asset/event we want you to push.
- **Product:** Look at all the cool functions and features we have.
- **HR:** Here are all the things you need to read and fill out so the company doesn't get sued.



# How to Design a Sales Onboarding Program for Faster Ramp

Sales reps operate on a need-to-know-basis. As sales enablers, your objective is to determine what the rep needs to know, and when, so they can deliver the best possible experience to the customer.

If enablement is the filter between all the interested departments and the new sales rep, what is the best way to apply the filter so the information gets through in a steady, comprehensive way?



## How Can We Make Onboarding Better?

When we dissect some of the best onboarding programs we've seen, they have three things in common:

- **They require a lot of time:** Onboarding is not an event. It's not a one- to two-week bootcamp. It requires far more time to be effective.
- **They're highly engaging:** You don't want to bore new people in classrooms the first couple weeks on the job. They need to be actively involved, doing meaningful activities as soon as the second day.
- **They show clear ROI:** You need to be able to prove to upper management that your programs are showing a return on the metrics you want to drive the most. It's not just checking boxes off a list of things to learn about the company.

Yet, research shows that most companies ignore the above best practices for onboarding:

- **60% of companies fail to set milestones or goals for new hires.** This means onboarding is treated more as a checkbox where you went to bootcamp.
- **Only 37% of companies extend their onboarding programs beyond the first month.** This is mind-boggling, especially when you look at the statistics of how long it takes for new reps to ramp. This means after the first month, there's no support left for reps.

We can do better than this, enablers! It all comes back to the overall productivity equation of sales:

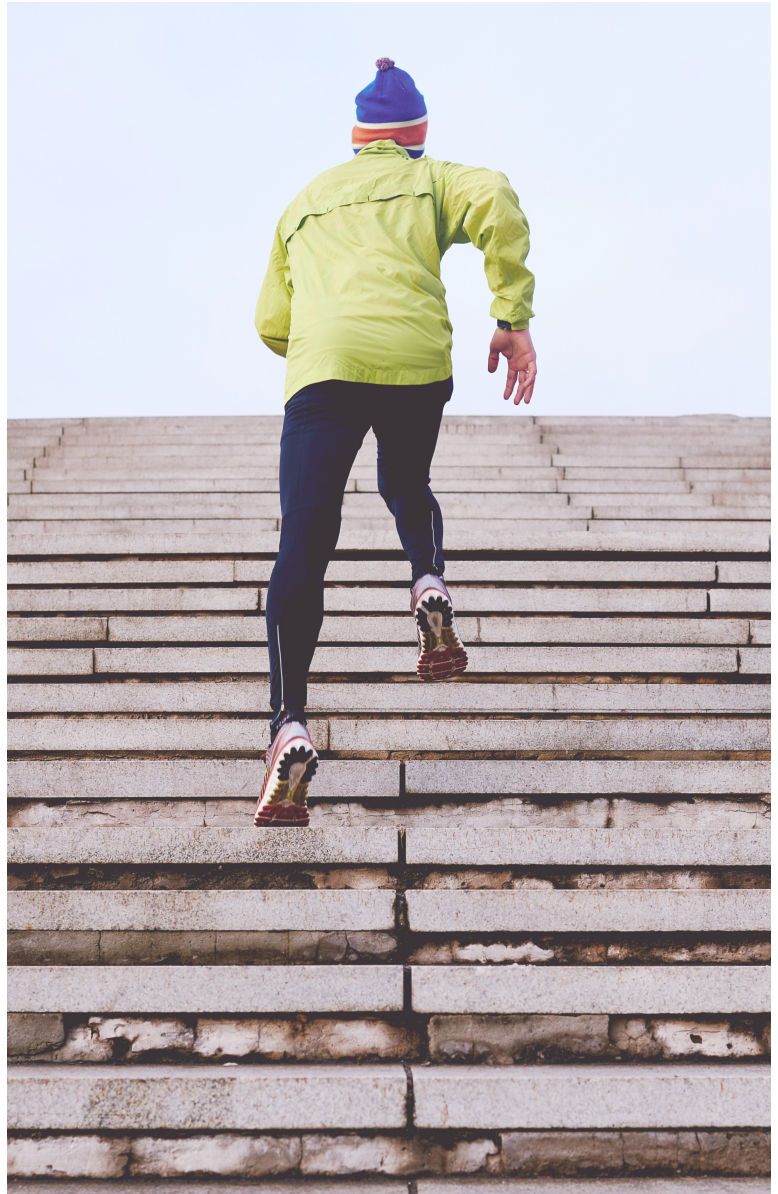
$$\text{Productivity} = \text{Tenure} - \text{Ramp}$$



The Bridge Group has done a great job talking about this. Think about how customer lifetime value (LTV) drives the way people are doing business plans. It's no different when creating a sales hiring and training plan.

Look at tenure (how long a rep stays with your organization) and ramp (the time it takes to hit 100% quota consistently) as the key levers to pull. If you can shorten the ramp time and increase the tenure of new sales hires through great onboarding, you're going to get far more from your sales individual contributors.

However, ramp has a unique aspect to consider: **The emotional stages that are hard to quantify in a sales hiring plan.**

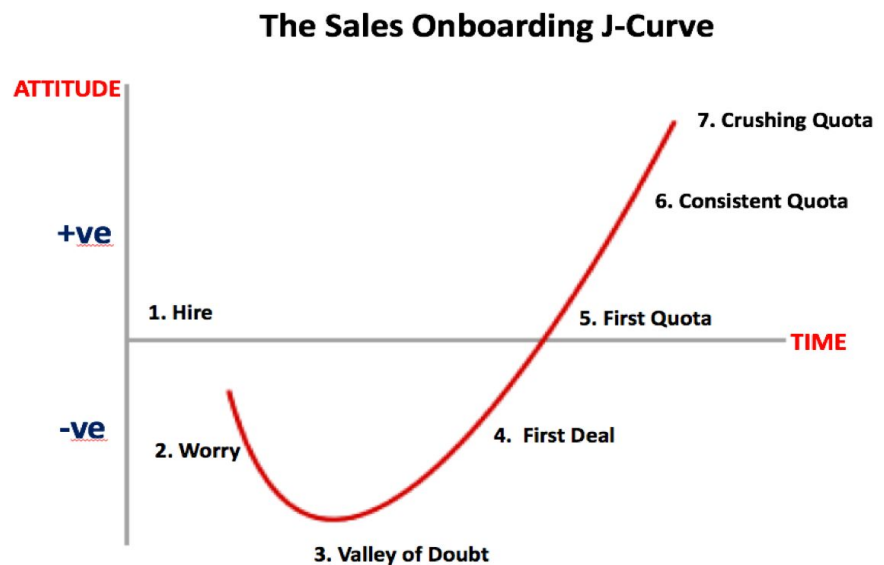


## Understanding the Sales Onboarding J-Curve

When thinking of onboarding, we really need to understand the mindset of a new rep throughout their initial journey. To do this, we want to introduce a new concept called the Sales Onboarding J-Curve.

In private equity, the J-curve is used to illustrate the historical tendency of private equity funds to deliver negative returns in early years and investment gains in the outlying years as the portfolios of companies mature.

Take the same economic concept of the J-curve, and apply it to a rep's onboarding experience. Just like investing, reps go through peaks and valleys of emotional states when starting a new sales job, or even a new position, before hitting consistent return.



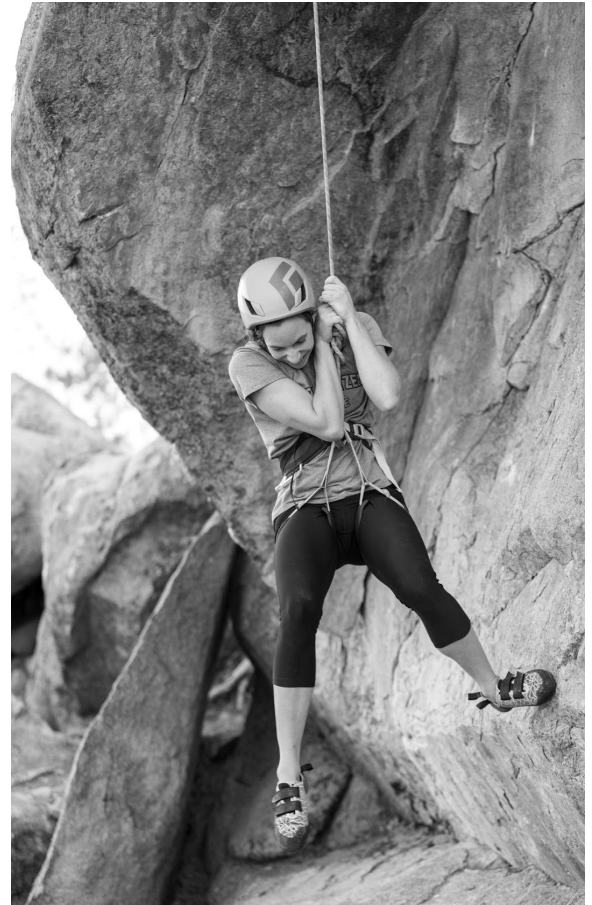
In the chart above, the Y axis represents the rep's attitude as being positive (+ve) or negative (-ve), and the X-axis represents time.

Every single sales rep goes through this onboarding journey, and many at different paces (faster and slower). And not everyone even has the stamina to make it past the lowest point. So, what are some of the thoughts and mindset reps go through while ramping?



**1. Hire:** This is where the honeymoon begins. If you did the due diligence and the interviewing well, then this should be a mutually exciting time. Sure, the training is intense and you're not getting a lot of sleep, but on the flip side you're getting adjusted to the work culture and starting to fit in. It's a good time to be you.

**2. Worry:** You've returned from bootcamp; the training wheels are off and if you're lucky you've been assigned to a mentor who likely has their own problems to worry about. You get your territory, and while excited to get going you are still not sure about where to start. Then a solid rep on your team has a deal slip and let's his emotion out. It's not all gongs and whistles.



**3. Valley of Doubt:** The hardest part. You start questioning your decision to come to the company. Is it me? Is it my patch? Maybe I should've have opened that restaurant I always dreamed of, or gone back to school to pursue my masters. Can I do this? Will it look bad if I quit now? I wish I could sell this stuff as well as I could interview. Your mind is starting to get biblical, and "as I walk through the valley of the shadow of doubt" might as well be etched into your desk.

**4. First deal:** I'm on the dashboard. Feeling a bit better, maybe I can pull this off. Was it a fluke? My manager said I did it faster than the last guy, but my teammates are not all that impressed. The "new guy glow" is starting to fade and lose some of its charm, but there is still a light at the end of the tunnel.

**5. First Quota:** Yes, I can do this. My VP officially knows my name. Four people that I don't know just told me that I have a bright future here. The sales enablement team have little hearts and birds circling around their head like they just met their soulmate whenever I walk into the room. I've heard that it typically takes eight months for a newly hired employee to reach full productivity, but I feel like I've done it in six.

**6. Consistent Quota:** I think I'm going to like it here. I just got paired to mentor the new guy. I know I'm getting better, but have I mastered the trade? I'm currently on cruise control but is that really all that I really want? Safe is good, but it's the risk-takers who get sonnets written after them.

**7. Crushing Quota:** I am awesome. I'm asking for more options. Wait, don't let it go to my head - the dashboard resets tomorrow and I will be back at the beginning with the other worker bees. I'm going to go teach someone else and become a manager. Nah, the money is so much better if I crush my quota again next year.



# How to Design a Sales Onboarding Program for Faster Ramp

As sales enablers and leaders, our objective is to get our new reps up the J-Curve as quickly as possible and to keep them from sliding back down. Often, we can do a better job at this.

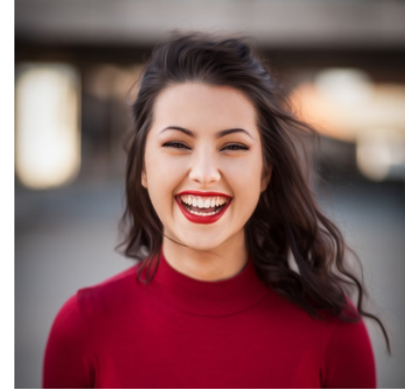
We need to be cognizant and focus on the programs and tactics that will help shift the onboarding curve from the red line, to the blue line (see below), getting reps out of the valley of doubt sooner, and getting them to first deal and first quota faster.



If we spent more time acknowledging and thinking about onboarding as getting the rep's emotional state and mindset ready for sales cycles, and not just as an information overload that's self-serving for the managers, then we'd all be able to ramp faster.

When we develop onboarding programs, we need to take into account the peaks and valleys that reps are going through. They're going to be the most confident and excited right after bootcamp. However, 30 days after they've "onboarded," they feel the least confident and prepared to do the job.

### Scenarios: The Math and ROI of Better Onboarding



Before we get into how to design better programs, let's look at the justification why you should build better onboarding in the first place. Here are a few scenarios:

- **The first scenario** you have Jimmy, who closed his first deal in three months, and fully ramps in seven months.
- **The second scenario** you have Trish, who closed her first deal in two months, and ramps a bit faster in six months.
- **And the third scenario** you have Carmen, who closed her first deal in two months, and ramps in five months.

At first glance, when you look at the scenarios, there doesn't seem to be a big difference. Jimmy had a pretty regular onboarding, while Trish and Carmen had a good onboarding experience. However, if you can move these levers by even 5-20%, it makes a world of difference.



# How to Design a Sales Onboarding Program for Faster Ramp

Let's look at a bit of math on how this works:

Revenue	Month 1	2	3	4	5	6	7	8	9	10	11	12	Total
Scenario 1	0%	0%	10%	33%	66%	80%	100%	100%	100%	100%	100%	100%	
Scenario 2	0%	10%	33%	66%	80%	100%	100%	100%	100%	100%	100%	100%	
Scenario 3	0%	10%	50%	75%	100%	100%	100%	100%	100%	100%	100%	100%	
Scenario 1	\$ -	\$ -	\$ 5,000	\$ 16,500	\$ 33,000	\$ 40,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 394,500
Scenario 2	\$ -	\$ 5,000	\$ 16,500	\$ 33,000	\$ 40,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 444,500
Scenario 3	\$ -	\$ 5,000	\$ 25,000	\$ 37,500	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 467,500
ROI 1 vs 2	\$ -	\$ 5,000	\$ 11,500	\$ 16,500	\$ 7,000	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 50,000
ROI 1 vs 3	\$ -	\$ 5,000	\$ 20,000	\$ 21,000	\$ 17,000	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 73,000
ROI 2 vs 3	\$ -	\$ -	\$ 8,500	\$ 4,500	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 23,000

As you can see, the impact of closing first deal one month earlier, or full productivity one month earlier, could add \$23k to \$73k per rep (assuming a \$50k per month quota). Now consider onboarding several cohorts of sales people and you will see the true value of reducing ramp time.

This is a complete justification of enablement programs that organizations are wanting to build, from the onboarding perspective.

## How to Design a Great Onboarding Program

Throughout this ebook, we've looked at both the quantitative and qualitative reasons of why you need better onboarding. In the following section, we'll show you how you can ramp reps faster.

### When They're Hired

Our primary recommendation is to start your onboarding with a buyer immersion, not a product dump. Today, it's critical for reps to understand who the buyer is, why they buy, what's important to them, and what kind of insights we have on customers.

Then, help reps with the sales process.

Start building their CRM muscles from the first day, and get your reps into Salesforce (or your CRM of choice) immediately as part of their day-to-day operations.

# How to Design a Sales Onboarding Program for Faster Ramp


We also recommend that you get reps active right away. Get them on the phone as soon as the second day. You can set up a fake prospecting call. However, the earlier they're comfortable being on the phone, the sooner they'll generate pipeline.


If you're running a two- to three-week bootcamp, you don't want reps to think they're going to sit back in headquarters, kick up their feet, have a good time, and not be on the phone with a potential customer right away.


Here's a program template for getting your reps to understand the buyer:


Click to add


Exercises


View


Playlist


Publish


Read


Listen


Attend


Peer Review

Coach


Role Play


Quiz


Program


Other


Milestones


Meeting

SQO

Deal

Quota

Certification

Other

8 Exercises · 1 Milestone · 4 Days

Attend: Onboarding Kickoff PLACEHOLDER

Attend the onboarding kickoff on your first day to learn more about the customer from our CEO, VP Sales, and VP Marketing

Day 1

Read: Total Addressable Market Report (2017) PLACEHOLDER

Understand the market definition and size for our offering.

Day 1

Listen: ACME Discovery Call PLACEHOLDER

Listen to customer discovery calls to better understand their needs

Day 2

PLACEHOLDER

Watch this highlight reel of customer testimonials to hear more about the challenges we helped solve.

Day 2

Meet: Customer Success Team

Meet with the customer success team to better understand the buyer journey

Day 2

Read: Our Company Buyer Personas PLACEHOLDER

Review buyer insights from our different personas - who they are, what they care about, their status quo, and how they buy.

Day 3

PLACEHOLDER

Submit a 2-minute presentation of your understanding of the buyer and the challenges we help solve.

Day 4

PLACEHOLDER

Complete the buyer immersion quiz.  
Quiz Target: 100%


Day 4

PLACEHOLDER

Complete the buyer immersion certification presentation.

Day 4

After the first or second day, if they have a really good understanding of the buyer, then you're off to a really great start.

leveljump

Page 13



## When They Start to Worry

There are many steps we can take at this stage to get them past initial worry.


First, tell your reps it's totally normal to be worried. Our CEO, David Bloom, said that when he first onboarded at Salesforce, other reps who were there for three to six months told him he should be very worried after 30 days, since there's so much to learn.


To mitigate this risk of worry, hire in cohorts or pair up new hires with buddies to discuss the psychological issues of starting a new job with a new company.


Get your reps to focus on prospecting early on. They need to be building pipeline, not worried about hitting quota. Talking to real prospects will get your reps to want to learn faster. Have them work on their prospecting playbook. This is also a good time to train reps on the different tools they need for the job. Offer micro learning (like videos) on how to best utilize the sales tech stack at your organization.


Here's a sample program template that reps use to learn how to find pipeline:


Exercises


  
View


  
Playlist


  
Publish


  
Read


  
Listen


  
Attend


  
Peer Review

  
Coach


  
Role Play


  
Quiz


  
Program


  
Other


Milestones


  
Meeting

  
SQO


  
Deal

  
Quota

  
Certification


  
Other

10 Exercises · 2 Milestones · 10 Days


  
Attend: Identifying Prospects Workshop

Attend this workshop from our Sales Enablement and Sales Ops team on how to identify the right prospects.


Day 1

  
Buddy-up with one of our top AEs to learn prospecting tips and tricks from them.


Day 2

  
Watch this playlist on how to set-up your LinkedIn Sales Navigator for success.


Day 2

  
Watch this playlist on how to use Salesforce for prospecting.


Day 2

  
Watch this playlist on how to use Outreach.io for prospecting.

Day 2


  
Take a quick quiz about our technology stack.

Day 2

  
Read: Value Props by Buyers & Products


Read this detailed buyer and product overview to better understand the value propositions to highlight while prospecting.

Day 3

  
Review: Successful Voicemail & Email Templates


Take a look through our most successful email and voicemail templates to get people to agree to a meeting.

Day 3


  
Activity: Make your first call

It's time to do some prospecting! Make your first call and connect with a prospect.


Day 3

  
Submit a video outlining your call plan, your voicemail template, and your email templates. How are you positioning value to prospects?

Day 3

  
Role play with your direct manager.

Day 5

  
Meeting

Book your first discovery meeting.

Day 10

## Getting Through the Valley of Doubt

At this point, reps should have a few meetings booked, and are well on their way to building pipeline.

You have to get your reps out of the valley of doubt quickly.

Make sure that reps understand the right goals. You'll have some reps coming in wanting to be rainmakers, and starting to fire on all cylinders. However, make them focus on the key leading indicators in the beginning. Whether it be connects, booking meetings, or finding pipeline, identify some of the things they might be nervous about and focus on setting small goals that build up confidence.



Make them practice prospecting by role playing with peers and managers. You could also hold a pitch competition.


Give them the right resources. One-pagers, case studies, quick sheets. You don't want to overwhelm them with too many how-to guides, but you want to offer support. Have them listen to win stories and submit peer-to-peer videos.


Essentially you want to start developing the finer details and the more advanced sales skills that will start boosting the reps confidence.


# How to Design a Sales Onboarding Program for Faster Ramp


Here's a program template for getting people on closing your first deal:


**Exercises**


View


Playlist


Publish


Read


Listen


Attend


Peer Review

Coach


Role Play


Quiz


Program


Other


**Milestones**


Meeting

SQR


Deal

Quota


Certification

Other


9 Exercises · 2 Milestones · 45 Days

 **PLACEHOLDER**  
Develop a call and prospecting plan with your direct manager.


Day 1

 **Read: Objection Handling Map** **PLACEHOLDER**  
Read the objection handling map to get better prepared for your calls.


Day 1

 **Read: Competitor Battle Cards** **PLACEHOLDER**  
Read over the competitor battle cards to better familiarize yourself with the buyer's ecosystem.


Day 1

 **PLACEHOLDER**  
Role play with your direct manager to practice your call plan.


Day 2

 **PLACEHOLDER**  
Pitch competition! Give us your best elevator pitch.


Day 5

 **SQR**  
Find pipeline!


Day 15

 **PLACEHOLDER**  
Congrats, you've found pipeline! Get coaching from one of our top AEs to help you give tips and tricks on how to close your first deal.


Day 20

 **PLACEHOLDER**  
Watch this video about how to negotiate your first deal.


Day 30

 **PLACEHOLDER**  
Watch this video to help you generate a quote.

Day 30

 **Review: Contract Template** **PLACEHOLDER**  
Review the contract template to help you close your first deal.

Day 30

 **Deal**  
Close your first deal!

Day 45

At this point, reps should be starting to show first signs of revenue, and emotionally getting over the hump.


## After Hitting First Deal


New sales hires hitting their first deal is a great accomplishment, so celebrate! Have reps share their win with the rest of the team. How did they do it? What was the use case? How can the incoming cohorts learn from their experience?


Don't get cocky! Get them focusing on going after the second deal. The high from the first deal will quickly fade, and after the first of the month, the dashboard resets. If they don't focus on winning that second deal, they'll quickly forget about their success and start slipping back into the valley.


Here's a program template on getting to second deal:


Exercises


  
View


  
Playlist


  
Publish


  
Read


  
Listen


  
Attend


  
Peer Review

  
Coach


  
Role Play


  
Quiz


  
Program


  
Other


Milestones


  
Meeting

  
SQR


  
Deal

  
Quota


  
Certification

  
Other


9 Exercises · 1 Milestone · 20 Days

  
Review: Your First Closed Deal  
Review all of the communications, emails, and notes from your first deal.


Day 1

  
PLACEHOLDER  
Present insights from your first deal to your direct manager to receive feedback and coaching. What went well? What can you do better next time?


Day 1

  
Listen: Your First Discovery Call  
Listen and analyze your first discovery call with your first deal.


Day 1

  
PLACEHOLDER  
Submit a video with your analysis of your first deal for others to learn.


Day 5

  
Read: Customer Case Studies  
Read customer case studies to freshen-up your knowledge of the customer.


Day 5

  
Read: Objection Handling Map  
Read over the objection handling map again to freshen-up your insights.


Day 6

  
Read: Buyer Persona  
Read over the buyer persona documents again to freshen-up your knowledge.


Day 6

  
Read: Value Props by Buyer & Product  
Read over the value prop documentation to freshen-up your knowledge.

Day 7

  
PLACEHOLDER  
Now that you've re-read the documentation about the buyer, what would you do differently for your second deal?

Day 8

  
Deal  
Close your second deal!

Day 20

Arguably, time to second deal is the most important metric in onboarding. A shorter time to second deal eliminates the possibility of that first deal being a fluke. You want to make sure that reps are on a path to repeatable success.

## Hitting Quota Quickly

Once reps have these first deals out of the way, it's time to build muscles that lead to consistent quota achievement.

Focus your reps on “getting better” goals. What area do they want to improve? Tell them to put a plan in place and really put some gas on the fire of excitement of this next phase of success.

Have reps talk about where they failed, and how they can learn from that experience to improve. Do deal reviews, get them discussing lost pipeline, doing pre and post-mortems.

It's also a great time to start challenging reps. Experiment with different metrics. How can you find pipeline faster? How could you shorten the sales cycle? This will really start developing their sales strategy skills.

Don't forget teach-backs at this stage. Just because they've closed a couple deals doesn't mean that the learning stops. Have them go through micro-learning programs and teach the information back to peers and managers. They need to continuously show improvements in knowledge.

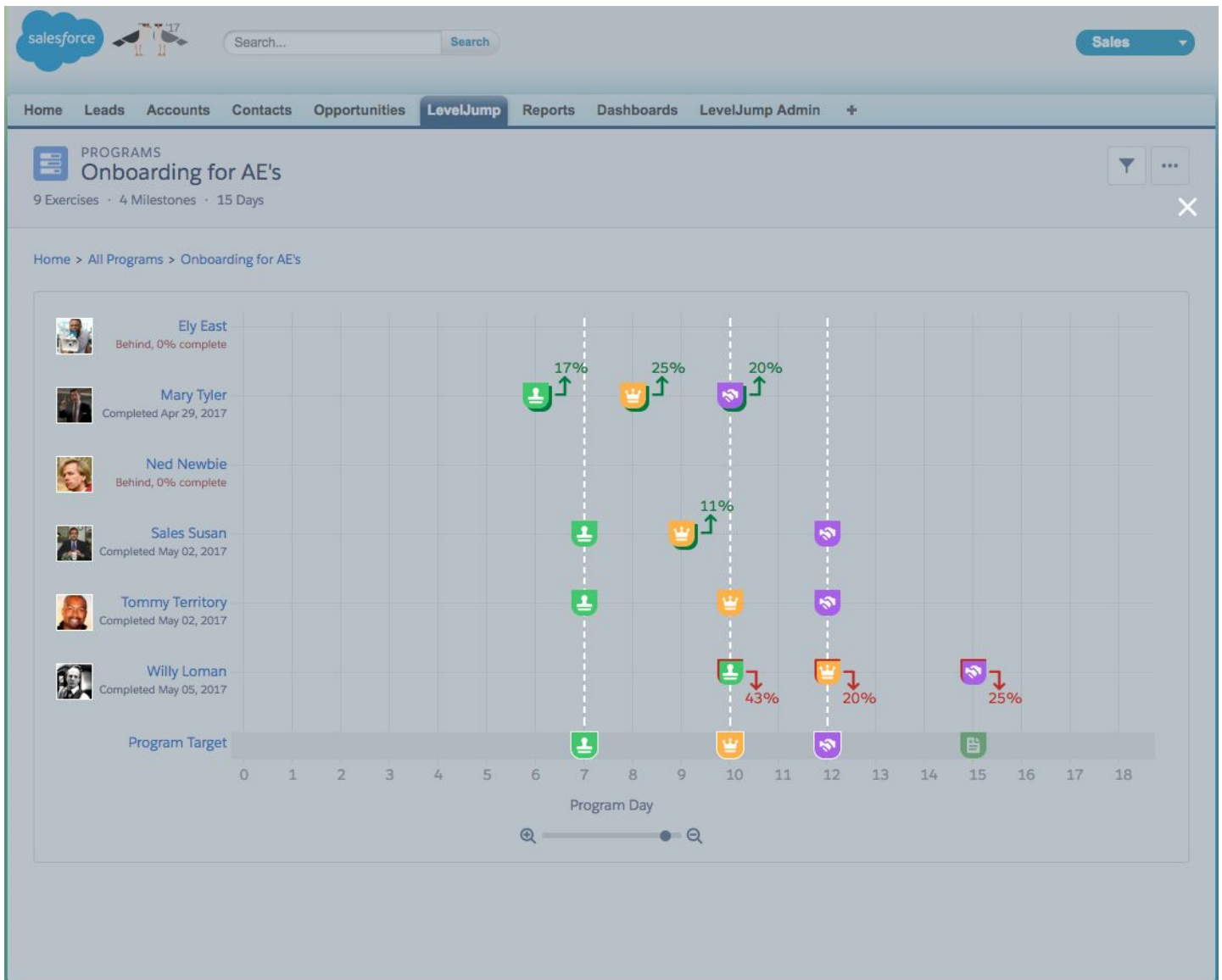
Once your cohort is ramped, it's a good time for sales enablers and leaders to understand the trends for the sum of your reps.

When you're leveraging the right technology to deliver and measure your onboarding programs, you can really start getting amazing insights on what's working, and what you can do better as enablers for the next cohort of reps.

# How to Design a Sales Onboarding Program for Faster Ramp

Start looking at every milestone in onboarding, from first meeting to first deal and quota achievement, and look at what programs, certifications, or coaching reps received that led to faster ramp.

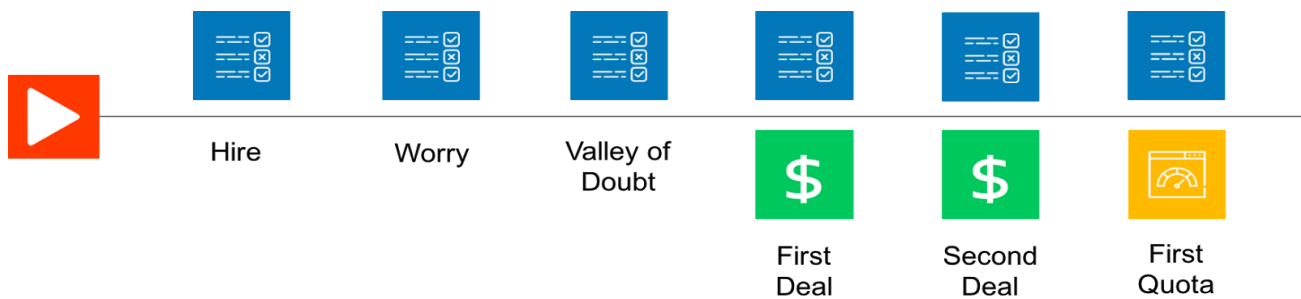
Really look at the time stamps of these activities and milestones. You can pull averages for your cohort, and understand who's ahead, and who's falling behind, so you can quickly course correct.





## Conclusion: Visualizing Better Sales Onboarding

Now, let's visualize the Sales Onboarding J-Curve as a straight line, and look at it as the support and programs you've run over time. By equipping reps with the right programs, assets, training, and coaching, at the right stages of the Sales Onboarding J-Curve, you'll help speed up your ramp time and build a confident sales force.



Remember, onboarding can be applied to new hires, but also employees who are moving into a new role (like a SDR being promoted to AE).

If you treat onboarding as a time-fixed event, then you have it wrong. You're really setting up your reps for failure. Millennials really crave learning opportunities, so frequent programs and micro learning during onboarding will work really well with this group.

Reps might determine how long they'll stay at your company as soon as 30 days into the job. So make sure your onboarding experience is great.

Think about the emotional stages reps will go through during onboarding. It's not meant to be an information dump from every department. That can often cause reps to worry even more, since they'll feel overwhelmed.

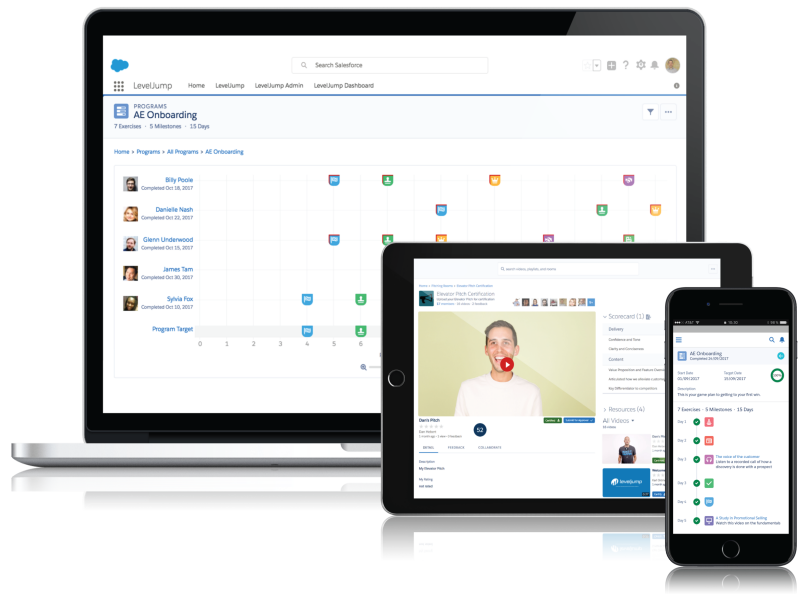
Finally, include teach-backs every few days during onboarding so that you're sure that reps are really understanding and retaining the information as they work towards their milestones.

## About LevelJump Software

LevelJump is the sales enablement & readiness solution that reduces ramp time of new sales hires and proves impact on revenue by attributing sales enablement programs, training & coaching to metrics in Salesforce.

Built on the world's #1 CRM platform, Salesforce.com, LevelJump leverages the capabilities of the Salesforce Sales Cloud® to enable companies to achieve faster ramp of new reps, time to productivity and quota consistency all within one seamless experience.

Prove the impact of your sales enablement with LevelJump.



**To learn more about LevelJump, contact us today to discuss how you can get your reps up to speed faster.**

Request a Demo



We help high-growth companies reduce ramp time and increase quota attainment for sales representatives by providing training programs from within the tools sales teams are already using, and linking those programs to business outcomes.

Together, these allow sales management to identify and replicate what's working in their sales teams and create predictable revenue results at scale while optimizing their processes with data-backed decisions.

To learn more about how we've helped, read our reviews on [G2 Crowd](#) and the [Salesforce AppExchange](#).



120+ reviews ★★★★★

Customers  
Love Us



70+ reviews ★★★★★



Sales Training  
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Sales  
Enablement



4.4  
Rating