




**THE BRAINSHARK<sup>®</sup>**

# AGILE SALES ONBOARDING METHODOLOGY

An agile approach to new hire training using  
technology to accelerate time to productivity



"Today's accepted norm for every SaaS company is the ability to continuously operate, with no down time, 24/7/365."

Sandeep Soman  
VP of Product & Design  
Brainshark

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# Introduction

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## **Agile (adj):** able to move quickly & easily

Ask any sales enablement leader what their biggest challenges are, and sales onboarding will likely be somewhere at the top of the list.

In today's hyper-competitive business environment, enablement leaders are under intense pressure to accelerate the time to productivity for new hires. Too often, reps are pushed into the field before they are ready, and onboarding is done "on the job" – through trial and error.

Is this approach working? Not according to the Sales Management Association. They report that 60% of onboarding programs are not meeting the expectations of sales managers. Sending underprepared salespeople out to practice on buyers before they're ready is not fair to either the rep or the buyer. And the hidden cost of lost opportunities and damage to your brand due to incompetent reps makes this approach extremely costly.

To match the speed of business today, companies should think about onboarding in a completely different way. In response to this, we've developed **Brainshark's Agile Sales Onboarding Methodology**, which applies agile development principles used in software development, to the onboarding of new sales hires.

Agile principles enable flexibility, responsiveness and quick course corrections – all the things that today's companies need to stay relevant in the market.





## What is agile?

Years ago, in the days of on-premise software, technology development was a long process, where companies had the luxury of spending months or years developing new products or features and would only release them when they were completely ready. With the introduction of software-as-a-service (SaaS), companies were forced to adapt to an atmosphere of constant innovation and, in turn, quicker development and deployment of software.

This is where the agile development methodology came into play. **Agile allows companies to develop software and push out incremental updates to show value along the way.** For example, a software company will release updates every few weeks, identify the bugs and make fixes in days, rather than months.

### **Agile consists of 4 stages:**

- **Planning:** make a list of business priorities or features that need to be created or updated
- **Sprints:** start executing on your list and get feedback along the way
- **Review:** review work and make necessary adjustments or bug fixes
- **Retrospective:** look at what worked, what didn't and what could be changed for next time

“The effort to find the best way to put out incremental updates and show value along the way – that’s how agile was born,” says Sandeep Soman, VP of product & design at Brainshark. “Agile is a time-boxed, iterative approach to software delivery – it builds software incrementally and gets continuous customer feedback.”

**“We had to come up with a new way to ensure reps are ready for the next key activity they need to do, to show competency and the notion of, ‘Is this salesperson ready to provide value to a customer?’”**

Jim Ninivaggi  
Chief Readiness Officer  
Brainshark



## Agile Onboarding: At-A-Glance

### Planning:

Make a **list of required competencies** of which a salesperson needs to demonstrate mastery

### Sprints:

**Activity-based training and assessments** where reps are expected to complete the task in a given amount of time

### Review:

Check with sales leaders on the **status of reps and effectiveness** of the program

### Retrospective:

Review where program added value, **what could've been done better** and what could be changed next time

## Agile meets onboarding

The idea behind Brainshark's Agile Sales Onboarding Methodology is to use the same structure as agile software development but tweak it to fit the key steps of the onboarding process.

In the days of yore, (as with software) many companies would onboard reps for weeks or months at a time and wouldn't send them out into the field until they were deemed "completely ready." This traditional onboarding approach consisted of time at company headquarters to receive in-person instruction, shadowing a senior rep for a few weeks, then perhaps back to HQ for a final week or two of in-person workshops and certifications. Today, very few companies have the luxury of taking this amount of time to get a rep field-ready.

The goal of onboarding has never changed. It's still about accelerating time to productivity, but how sales enablement leaders accomplish that must change. The solution is simple: to accelerate time to productivity

one must accelerate time to proficiency in the key activities that lead to productivity. A simple, but powerful, paradigm shift. Productivity does not happen without activity. And it's not just about the amount of activity, but the level in which those sales activities are performed.

Agile onboarding turns the onboarding timeline into rep 'release cycles' that are weeks-long (instead of months) where rep 'bugs' are quickly identified, and adjustments are made until the rep is ready to go out and sell. Short time periods, called Sprints, are focused on getting reps ready to proficiently perform the next critical activity that will lead to closed deals.

### Getting Buy-In Across Sales

Before jumping into agile onboarding, it's important to get several important stakeholders from the sales organization on board:

**CSO and Sales Managers:** The CSO should collaborate with sales managers to set dates for when reps need to accomplish critical activity milestones, such as their

first prospecting call, first face-to-face sales meeting and first product demo.

**Sales Managers and Sales Enablement:** These groups will collaborate to build the dates into a timeline and define competencies for each. Sales enablement will be responsible for providing the content and assessments.

Getting these stakeholders on board adds a layer of accountability. Reps are accountable for taking their training or coaching and developing their competencies. At a higher level, managers are on the hook for coaching their reps and sales enablement must create the content and assessments that hold the program together.

The steps to agile onboarding are broken down in the same 4 stages of agile development: Planning, Sprints, Review and Retrospective. Laying out the program this way will ensure that reps are developing competencies in the order they'll need them and in time for their next sales activity milestone.



## Step 1: Planning

The planning stage is all about building out a list of required competencies and activities that reps need to be successful in whatever sales role they're in.

**Competencies** are the knowledge and skills required to do a rep's job. **Activities** are those critical interactions that happen throughout the selling/buying process. Agile onboarding is about ensuring that required competencies are mapped against those key activities.

"Focus your early onboarding efforts on getting reps really good at the things that lead to productivity," says Jim Ninivaggi, chief readiness officer at Brainshark. "Too often, time is spent on learning internal systems and processes. Learning to submit expense reports may be important, but it won't impact a rep's ability to interact with a buyer. Agile onboarding places a

relentless focus on those critical selling activities that lead to productivity."

Work with sales leaders on the expectations of when salespeople should be able to do their first activity and align the timeline of the corresponding training and coaching accordingly.

The timeline for most activities doesn't have to be set up in a traditional 30-60-90-day format (for example, reps might be asked to complete their first prospecting call within 14 days). However, core competencies that are not tied to a critical activity, such as CRM training or corporate policy training, can follow a 30-60-90-day format and take place in parallel to the rest of your competencies.



**Competencies:** listening skills, closing skills, negotiation skills, objection-handling, as well as knowledge of the product, customers, markets and competitors



**Activities:** first prospecting call, first demo call or first sales call

# AGILE ONBOARDING SPRINTS



## Step 2: Sprints

Sprints are made up of activity-based training and assessments, each taking place within a given time period. This stage differs from the Planning stage because once you've laid out your competencies and schedules, the sprints are where it all happens.

For example, if you expect new reps to complete their first sales call within the first two weeks on the job, you must schedule microlearning courses, video coaching assessments and a certification, before that 2-week mark

– in other words, before they get on a call with a prospect.

“[Sprints] are the essence of what makes agile onboarding different,” says Ninivaggi. “It’s about how we are defining those key activities the rep needs to execute on and building out Sprints where we get that person just ready enough to do that next activity really well.”

Coaching is critically important to each Sprint because it’s where you determine if the rep has absorbed the training material and can relay it back, or if the rep didn’t learn the material and needs to go back for more training. Agile

onboarding should aim to answer the critical question of, ‘can they do it?’ instead of the traditional onboarding question of, ‘did they do it?’

The certification should be given at the end of each Sprint, when the rep has mastered the competency and is ready for the buyer interaction. Sales managers or an embedded sales coach can determine from the coaching assessments whether the rep can receive their certification.



## Step 3: Review

The Review process is all about looking at reps' progress and performance in the Sprints. Check in with sales managers and leaders on a biweekly basis to answer the following questions:

- What's working? What's not working?
- Are reps hitting KPIs at the right time? (i.e., hitting certification levels in the necessary cadences)
- What was learned during the Sprint about the training and the rep's competencies? Is anyone falling behind?

How your sales team answers these questions will determine your course of action. If reps are falling behind, you can assign targeted learning and coaching assessments to those individuals. The advantage of agile onboarding is that you can look at the team and individual progress and address any potential issues early on, helping to reduce turnover and identify whether a rep is (or isn't) cut out for the job.

A key source of this information and data on rep progress and performance can be the embedded coach. The embedded coach – a sales enablement professional whose sole responsibility is ensuring the readiness of the field force through sales coaching – will be listening in on rep calls and know early on which reps are performing well (and which aren't) and can pass that information to sales managers for further action.





### The Technology Advantage:

Sales readiness platforms like Brainshark allow you to: **create, deliver and track** all the readiness courses for each Sprint.

You can also create and assign video coaching assessments to your reps to be scored and commented on.

## Step 4: Retrospective

The Retrospective takes the review process to the next level and looks broadly at the overall agile onboarding program. Check in with sales managers and leaders every 3 months to answer the following questions:

- What worked well that we should repeat?
- What didn't work well that we need to fix?
- What are we measuring?
- How many activities, modules and coaching activities were completed?

To answer these questions, look at a new hire class that has completed the agile onboarding program recently and see how they are progressing, whether they are completing sales leadership's goals or whether there was the right amount of learning (too much or too little) for each activity. Also, see if any adjustments can be made for further efficiency of the program.

For example, if sales leadership wanted the first prospecting call to take place within 14 days, is it possible for reps to get on that call within 12 days instead?

**"The Retrospective stage is all about looking for those critical outcomes from our salespeople that demonstrate competency, confidence and the ability to add value to their customer interactions."**

Jim Ninivaggi  
Chief Readiness Officer  
Brainshark

## Why agile onboarding is a game changer

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Many companies know that their traditional onboarding programs aren't cutting it, but what makes agile onboarding the better choice?

For companies, it improves time to productivity, which means they have a better chance of closing more deals, faster. For reps, it accelerates career progress, which helps with retention and getting reps to ramp up to full productivity faster.

The agile method of onboarding also greatly reduces the trial-and-error aspect of traditional onboarding. Instead of *spraying* your reps with a fire hose of continuous content and training and *praying* that they absorb it, agile onboarding gives you greater confidence that reps are making the right strides at the right times.


During the Sprints of agile onboarding, you can check to make sure reps are learning the material and can present it back during coaching. Instead of getting too deep in the onboarding process and having to backtrack, managers can pinpoint areas where reps are falling behind and assign more training and coaching on the fly, before it's too late.

**At Brainshark, we've implemented the agile onboarding approach with our sales team and have realized the following results:**

- Reduction in 'time to firsts' (first prospecting call, discovery call, presentation, etc.)
- Acceleration in time to first deals and revenue

The final key to success of agile onboarding is to remember that **onboarding and training are never done**. Reps will move on from agile onboarding, but in order to have long term success, they need to keep on learning and receiving coaching from managers.



A close-up photograph of a submarine's periscope. The periscope is metallic and has two large lenses. Above the lenses is a red circular sign with white text that reads "TURN TO CLEAR VISION". Below the lenses is a small rectangular sign that reads "QUARTERS ONLY". The background shows a blue sky and a city skyline across a body of water.

“Focus your early onboarding efforts on getting reps really good at the things that lead to productivity. Too often, time is spent on learning internal systems and processes. Learning to submit expense reports may be important, but it won’t impact a rep’s ability to interact with a buyer. **Agile onboarding places a relentless focus on those critical selling activities that lead to productivity.**”

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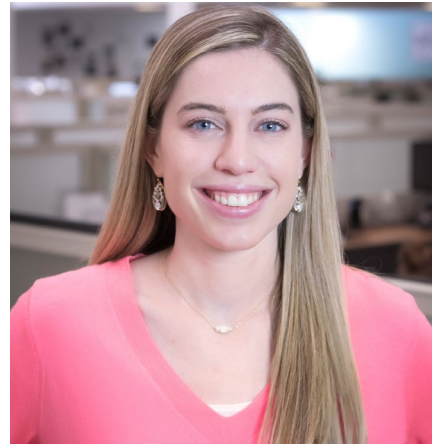
## About the Contributors



### **Jim Ninivaggi**

Chief Readiness Officer,  
Brainshark

With more than 30 years of B2B sales productivity expertise, Jim is responsible for ensuring that the Brainshark field force is ready to sell, leveraging the power of the Brainshark sales readiness platform. Jim previously headed the sales enablement research practice at SiriusDecisions, where he provided clients with data and insight to maximize sales effectiveness and accelerate revenues. He has held various positions in sales, ranging from individual contributor, sales management and sales leadership.



### **Lauren Boutwell**

Senior Content & Programs Manager,  
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With more than 8 years of content experience in the technology space, Lauren is responsible for content marketing and strategy at Brainshark. In her current role, she oversees Brainshark thought leadership content, the Brainshark Ideas blog, Brainshark's Sales Enablement Magazine, customer testimonials and social media. She previously worked in B2B technology journalism for CIO magazine and CIO.com covering all facets of the IT space.





## Want to learn more about sales enablement & readiness technology?

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## About Brainshark

Brainshark sales readiness software equips businesses with the training, coaching and content authoring capabilities to achieve sales mastery and outsell the competition.

With Brainshark, companies can: prepare sales teams with on-demand training that accelerates onboarding and keeps reps up-to-speed; validate readiness with sales coaching that ensures reps master your message; and empower sales organizations with rich, dynamic content that can be created quickly and accessed anywhere.

Thousands of companies – including more than half of the Fortune 100 – rely on Brainshark to identify and close performance gaps, and get better results from their sales enablement initiatives.

Learn more at: [www.brainshark.com](http://www.brainshark.com).