BRIEF

Pre-Boarding for Sales:

6 Ways to Prime New Reps for Onboarding

Sales onboarding is a lot like exercise – everyone knows it's important, but most of us could have a better approach. In both cases, it's common to wonder, '*Where do I start?*' or '*What can I do to improve?*'

Starting strong – and earlier— will get new sellers moving in the right direction sooner and set the right tone for the entire process. That's why it's time to rethink what happens *before* your sales hires first step through the door by making **pre-boarding** part of your sales onboarding strategy.

What is Pre-Boarding?

Pre-boarding is a way for sales organizations to jump-start the onboarding experience by easing new hires into the learning process before their official start date, and throughout their first week with the company.

Compared to a traditional onboarding strategy, which might have reps starting from "square one" when they first arrive, pre-boarding pushes reps down the path to productivity sooner. This approach creates extra momentum that helps sellers hit the ground running in their new role.

When done well, pre-boarding fully prepares sellers for their first week by:

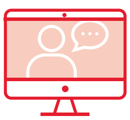
- Providing clear expectations for reps and their managers
- Enabling new hires to quickly connect with the company
- Defining who in the organization owns each part of the onboarding process

Here are 6 tips for getting new reps up to speed quickly with pre-boarding.

1. Start with the Basics

Proactive communication is critical with any new hire. But it's especially important with salespeople, who are the faces of your brand. That's why your "first touch" in the onboarding process should help new hires build a level of comfort with the company.

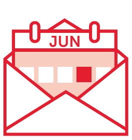
Getting sellers settled doesn't have to be complicated, though. Small touches that answer basic questions (i.e. who, where, when) help make onboarding smoother. Consider doing the following before reps step into the building for their first day:



Create a video message that introduces the sales onboarding team, and other key members of your company, to the class of new hires.

Provide reps with tips about their new office, dress code expectations, and where they can find food and other resources.

9:00am



5:00pm

Share a Day 1 schedule and send calendar invites to the new hires' personal calendars, so expectations are set for the day as well as arrival and departure times.

Mentors Matter

Having a formal mentorship program is another great way to help new sales hires succeed in your organization. Create a short checklist of specific tasks for when the new hire will shadow the tenured rep. For example, the new hire could be asked to listen to three of the tenured rep's customer calls in their first 30 days, while the mentor is required to give a "pre-brief" and "debrief" that adds context to each call and provides useful takeaways.

2. Get Your A-Players Involved

Research from ATD shows that 91% of sales reps believe peer learning helps them succeed. Pre-boarding is the perfect stage to help new hires start developing relationships with top performers. The key is allowing both the new hire and mentor to find common ground naturally. (After all, joining a new company can be uncomfortable for both sides!)

Consider having new hires create a short "About Me" presentation to break the ice once they've officially started. This can be as simple as creating a PowerPoint and adding voiceover narration using a content authoring tool.

Once the presentation is shared with the sales force, encourage an assigned mentor or other high performer to send the new hire a response. This allows your new hire to begin building a valuable peer relationship in their first week!

3. A Learning Path 'Warm-Up'

To get new sales reps producing faster, give them a head-start by making **pre-learning** content available before Day 1 - once their paperwork clears. This 101-level content package should be short and sweet, ideally taking 10 minutes or less to fully complete, and cover the need-to-know details around your products and solutions, value proposition, target industries and buyer personas.

When creating this content, it's helpful to maintain an executive-level perspective, since you'll want to present a broad view of the company to new hires. You can provide context around general market challenges, for instance, using resources such as recent news articles, market research, or customer case studies. Involving sales leadership in at least one piece of pre-learning content – via a video recording or voiceover PowerPoint presentation – is also helpful, as it's a great way to holds reps' attention.

Even though pre-learning is delivered before reps are on board, it's important to start assessments early. Include a quiz at the end of the learning that tests reps' understanding of basic, job-critical information around your company and buyers. Then follow up with reps to see whether they've completed the pre-learning and spend extra time with anyone who hasn't completed it or passed the quiz.

Remember, you can't force new hires to complete the pre-learning work before their start date; you can only emphasize that pre-learning will prepare them for Day 1. Ultimately, they'll choose whether to begin prepping 10 days or 10 minutes ahead of time.

Bite-Sized Microlearning

The best pre-learning is quick and easy to consume. To ensure reps stay engaged with pre-boarding content and retain what they learn, consider using a sales readiness tool like Brainshark, which makes it easy to create short, memorable microlearning content that can be a video, PowerPoint with voiceover, or document, and enhanced with links, attachments, and interactive quizzes.

4. Ensure Each Team Knows Its Role

It can take a village to help a new sales rep ramp up, including contributions from sales enablement, sales management, HR and IT. But if you're not organized, the process can become chaotic, which will only cause confusion for the new rep. That's why every team involved in the sales onboarding process needs to be in sync before Day 1, so that miscommunication doesn't occur once the new reps arrive.

Start by setting up a meeting with the new reps' sales managers to confirm:

- Where new reps will be located on their first day (e.g. remote, HQ, regional office)
- What the sales manager's availability looks like during Week 1 (e.g. are they traveling?)
- Expectations for manager-rep interaction and learning reinforcement during Week 1

Work to ensure that your sales enablement team, HR and IT all know which team is responsible for providing each resource your new sales hires will need. This includes hardware setup or shipment, depending upon where the new hire will be on Day 1, as well as licenses for the software tools your sellers use. They might not be top of mind, but your salespeople won't be very productive without them!

Remember, too, that the onboarding experience is your new hires' first real taste of the company – and it goes without saying that you want to leave a positive first impression. That makes pre-boarding your chance to determine who is responsible for each part of the onboarding process. Reps need to know who to go to for questions and troubleshooting, and you need to establish how the handoff takes place between HR, IT and enablement.

5. Connecting Through Culture

Starting a new job can be intimidating for new sales hires, and often, this feeling is a fear of the unknown. They may wonder, “what will working at this company really be like?” Giving reps a glimpse into company culture is a great way to alleviate new job anxiety.

Start by putting an executive face on your video communications, such as the CEO or the top sales leader, so that the message fully resonates. Have leaders make an introduction, define the company mission and goals, and highlight what the executive team values most as leaders.

Also consider giving your new sales hires a chance to ask the executive team a question, which can be asked and answered via a video message, email, or later during a live onboarding session.

Keeping Remote Reps Connected

Whether new reps are remote or working at company headquarters, it’s important to keep the learning experience consistent for the entire sales force. With a sales readiness platform, you can make on-demand microlearning available to reps in the field (and at home) during their first week and beyond, so they can access training and content whenever, wherever and however they work.

6. Make the Transition Smoother with Technology

Whether reps are in their first day, first week or transitioning into the “meat and potatoes” of sales onboarding, sales readiness tools are a helpful resource for every stage in the onboarding journey. Your platform should provide a single place for all new sellers – remote or otherwise – to quickly access training content, just-in-time learning and assessments from Day 1 forward.

A sales readiness platform makes it easy to assess whether new sellers have mastered pre-learning and onboarding material. These assessments can be as simple as a short quiz, or a video coaching activity where reps ‘stand and deliver’ what they learned. If it’s the latter, a manager or sales coach could provide a score with feedback so the reps know where they performed well and where they need to improve.

These assessments are critical, because they allow sales teams to make sure every new seller has a strong understanding of key material (or if they need to review learning again) before they’re too deep into your onboarding program.

Readiness solutions also allow sales organizations to quickly update new hire training content as needed, since the information reps use to get up to speed – from product and messaging updates to competitive intel and market trends – changes constantly. (And the last thing you want is a new seller learning old messaging or out-of-date product info.)

With technology, sales enablement and training leaders can more easily scale, manage and measure their onboarding efforts and the progress of new hires. This helps ensure a consistent and positive onboarding experience for every seller you hire – one that hopefully sets the stage for many productive years with your company!

Want to learn more about sales readiness technology?
See a Demo: www.brainshark.com/see-a-demo
Contact Sales: www.brainshark.com/contact-sales