

How Readiness Scorecards Improve Onboarding So More Reps 'Make the Grade'

BRAINSHARK



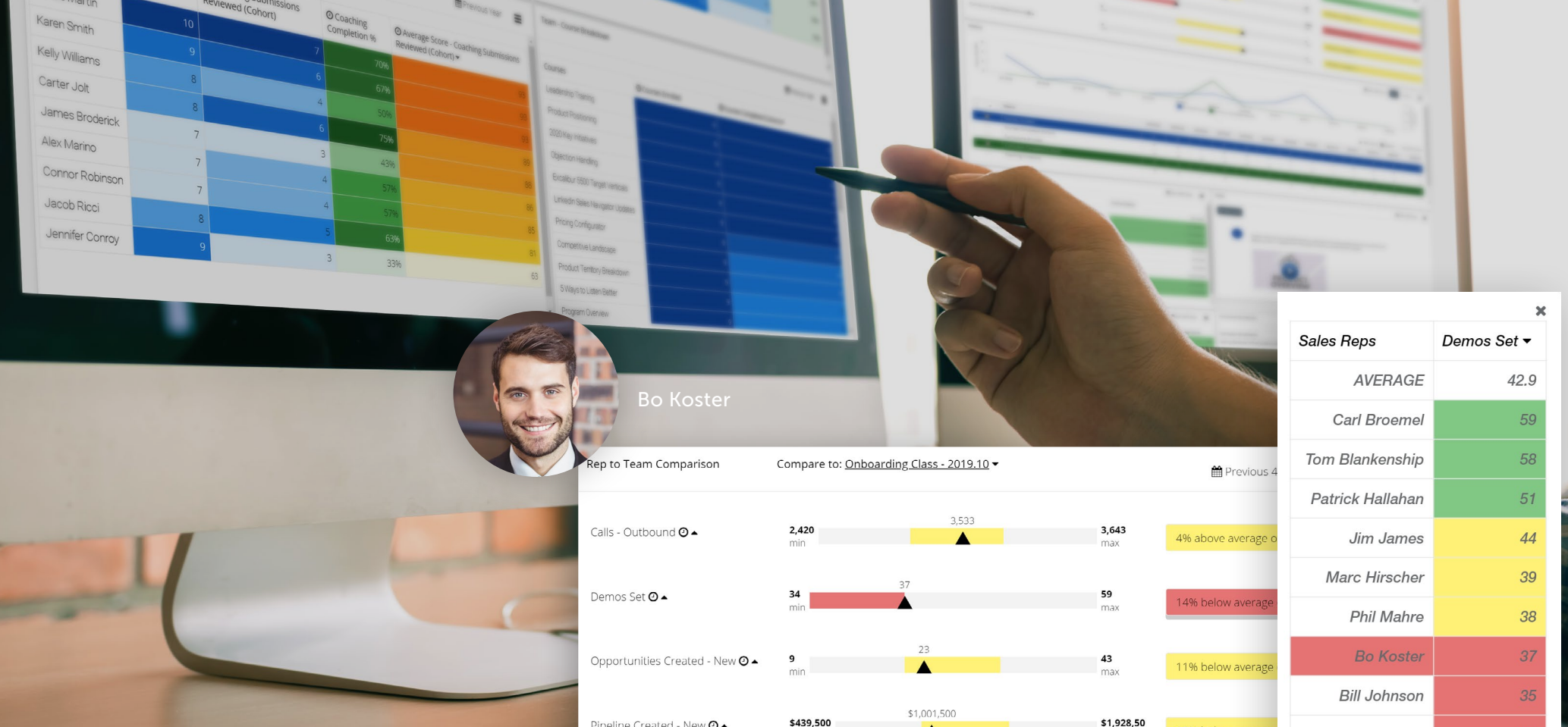
Introduction

Time-to-productivity has long been the key metric for onboarding new sales reps. However, getting new reps fully ramped up and contributing has often been more art than science. What’s more, because time-to-productivity is a lagging indicator, it’s not useful for understanding and guiding each rep’s journey to productivity – any more than “time-to-college-preparedness” would be a useful, stand-alone indicator for how well a student builds academic skills throughout high school.

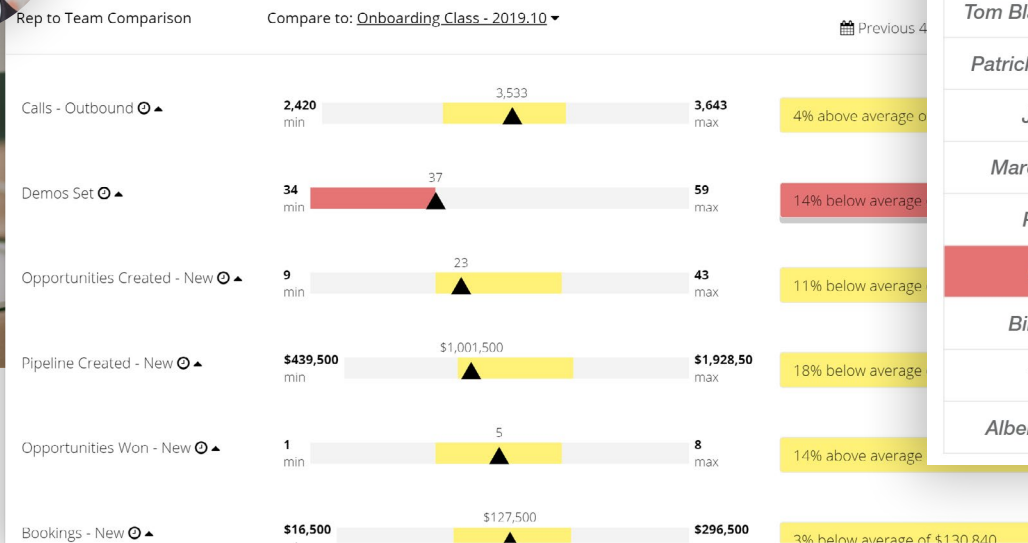
Academics are actually an apt metaphor for the onboarding process, because just as parents rely on report cards and test scores to understand their children’s progress as students, sales organizations can use a similar tool – scorecards – to understand the progress of new reps.

Just as tests and report cards indicate strengths, along with areas for improvement so students can

correct weaknesses before college (and, eventually, the workforce), scorecards also give sales leaders and their reps the ongoing measurements and visibility they need – so reps can course-correct before entering the field and stay on track to achieve time-to-productivity goals.



Bo Koster



Sales Reps	Demos Set
AVERAGE	42.9
Carl Broemel	59
Tom Blankenship	58
Patrick Hallahan	51
Jim James	44
Marc Hirscher	39
Phil Mahre	38
Bo Koster	37
Bill Johnson	35
Tina Maze	34
Alberto Tomba	34

What are Scorecards?

Sales scorecards (via Brainshark) put data from a variety of systems (e.g., CRM, marketing automation platform, sales engagement platform, sales readiness platform, customer support applications and more)

into a “coachable” context (with the data highlighting where a rep needs to strengthen skills, so managers can coach to those areas).

In addition to showcasing how a rep performs against key metrics, scorecards can give at-a-glance comparisons of a rep’s performance against peers and goals, and show trends over time. Much like tutors

develop individualized action plans for their students, managers can use the insights from scorecards to provide 1-on-1 coaching in the areas that need shoring up, and then track whether performance improves.

The above sample individual rep scorecard provides a glimpse into how this works.

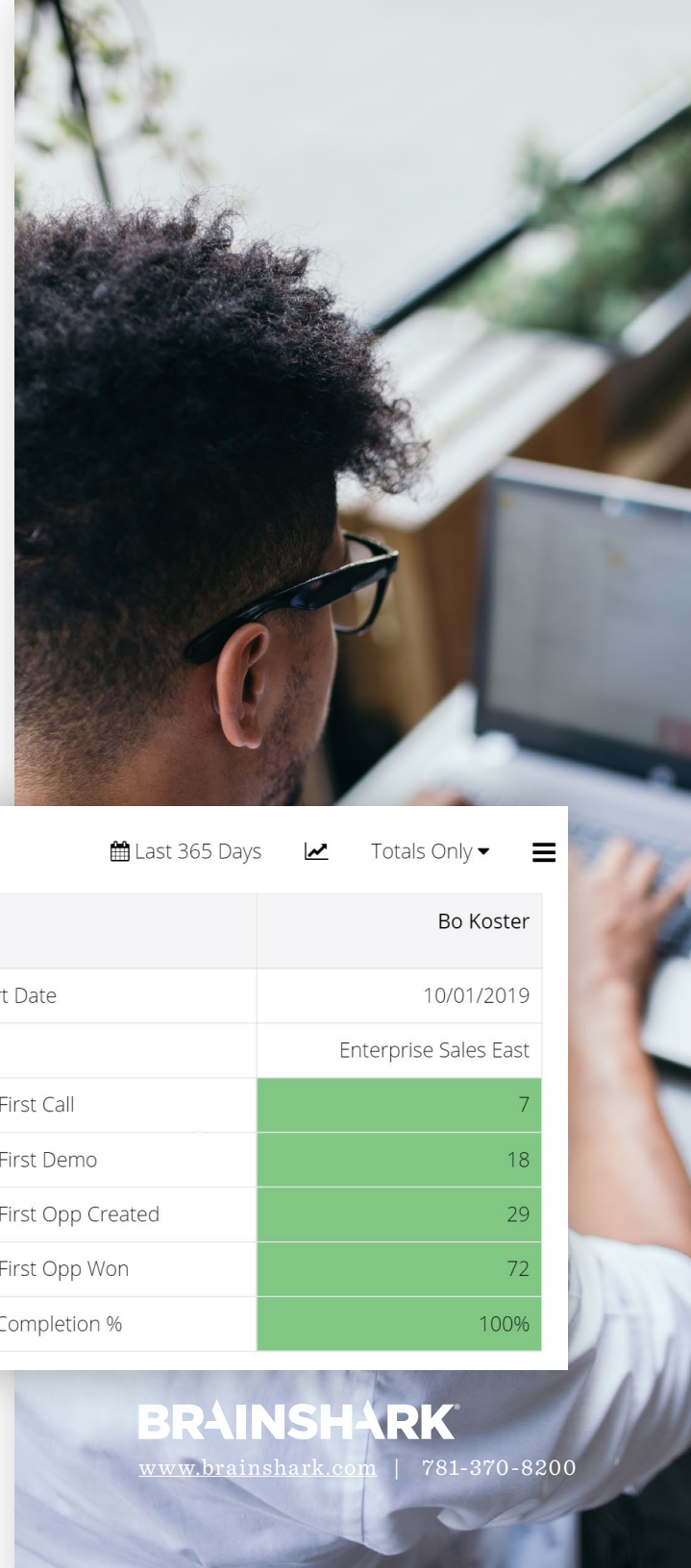
Scorecards for Onboarding

There's a great opportunity to apply scorecards to enhance onboarding results. By using onboarding scorecards, with agreed-upon metrics such as time-to-first-call, time-to-first-meeting, etc., companies can:

More effectively measure new reps' success.

When gauging new rep performance, many companies look only at time-to-first-deal. But given potentially long sales cycles, it's useful to get earlier indicators of onboarding effectiveness and ROI.

Onboarding scorecards can show how quickly and effectively new reps hit milestones, relative to established benchmarks. In fact, this visibility often expedites time-to-first-deal, giving reps and their managers the opportunity to identify and curb bad habits before they become ingrained, and capitalize on areas of strength.



Days to Productivity 📅 Last 365 Days 📈 Totals Only ▾ ☰

<input type="checkbox"/> ▾	Metric	Bo Koster
<input type="checkbox"/>	Rep Start Date	10/01/2019
<input type="checkbox"/>	Role	Enterprise Sales East
<input type="checkbox"/>	Days to First Call	7
<input type="checkbox"/>	Days to First Demo	18
<input type="checkbox"/>	Days to First Opp Created	29
<input type="checkbox"/>	Days to First Opp Won	72
<input type="checkbox"/>	Course Completion %	100%

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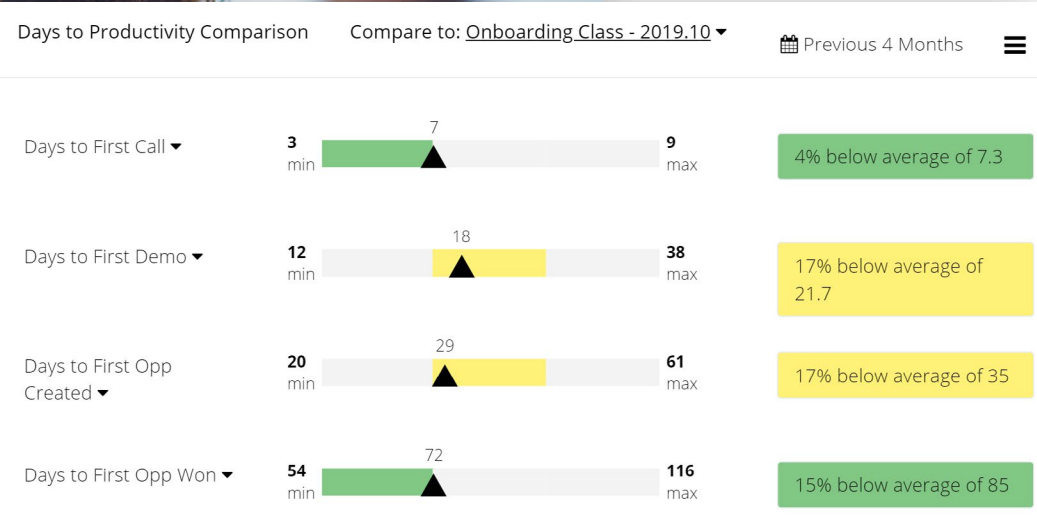
Take an “agile” onboarding approach.

Agile onboarding – a methodology that tasks new reps with developing skills mapped to discrete and chronological career milestones (rather than in a random order) – improves rep productivity, compared to traditional drink-from-the-firehose programs.

Scorecards align well with the agile onboarding approach, because they can track reps’ progress, so issues can be identified and corrected as they arise on a “per-milestone” basis (rather than waiting for the rep fall deep into a hole they can’t escape).

Reps’ scorecards could be structured to measure time-to-first-prospecting-call, discovery call, product demo, etc. – and then sales leaders can understand how each rep is progressing toward those goals against established benchmarks. Reps benefit too, because the scorecard defines the timeline in which

they are expected to achieve certain milestones.



Courses	Enrollments	Complete	Incompletes	Overdue Enrollments	Average Test Score
TOTALS	42	21	21	0	0%
AE Onboarding 6 - Exam	7	2	5	0	92%
AE Onboarding 5 - Advanced Use Cases	7	2	5	0	0%
AE Onboarding 4 - Manager Challenge	7	2	5	0	90%
AE Onboarding 3 - Personas	7	4	3	0	0%
AE Onboarding 2 - basics	7	5	2	0	0%
AE Onboarding 1 - Intro	7	6			

Tailor onboarding content for reps.

Every learner is different, and yet sales onboarding often gets delivered in a “one-size-fits-all” fashion – providing identical content to everyone (regardless of previous experience, aptitudes, etc.). Scorecards make it easy to identify where reps excel and where they need more work, so onboarding (and subsequent coaching) can be tailored down to the individual level for maximum results.

Measure the success of onboarding programs at large.

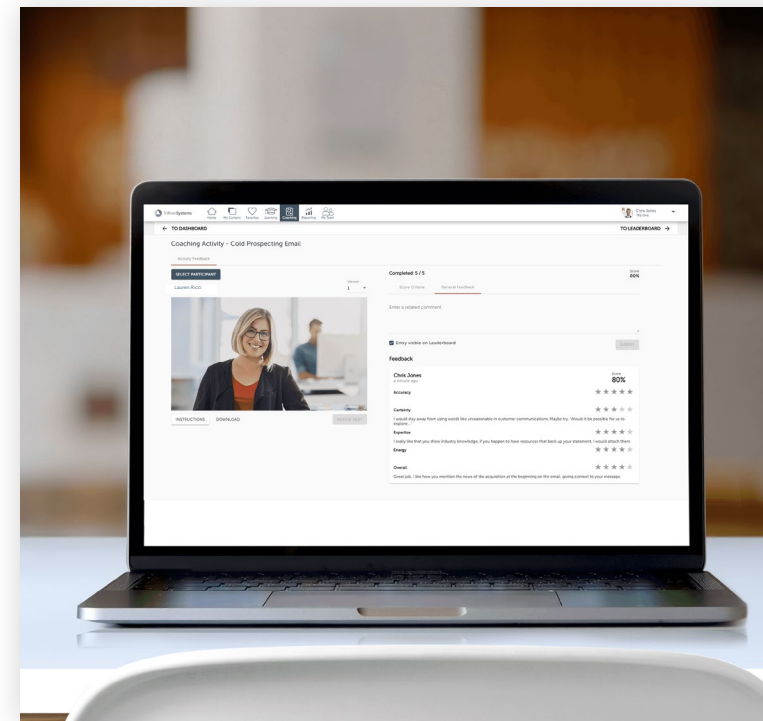
Scorecards provide a “single source of truth” related to rep readiness, as well as a data-driven way to report on the value of onboarding and other sales-enablement programs.

Traditionally, sales enablement teams have had to scramble to find this information – accessing and assembling multiple sources of data around rep onboarding and training activities, for analysis with the proverbial “monster” Excel spreadsheet or

Users	All Enrollments	Completed	Incomplete	Overdue	Completion %
TOTALS	84	22	62	4	26%
Bruce Wayne	12	7	5	0	58%
Lois Lane	12	4	8	1	33%
Wade Wilson	12	4	8	1	33%
Hal Jordan	12	3	9	1	25%
Diana Prince	12	3	9	0	25%
Hank McCoy	12	1	11	0	8%
Al Simmons	12	0	12	1	0%

general-purpose business-intelligence (BI) tools. Mapping those activities and data points to the sales pipeline in this way is difficult, providing a tenuous connection at best.

Sales scorecards, on the other hand, bring forth the data to directly connect onboarding and pipeline – tying readiness to revenue, and allowing sales enablement to understand where to drive performance improvements. (Are new reps hitting desired milestones when they should be? Are lapses in certain areas tied to training deficiencies? etc.) Plus, executives are much more likely to trust data coming from a dedicated scorecard system, rather than from manual collection and manipulation. Simply put, there’s no way to “cook the books” with scorecards.

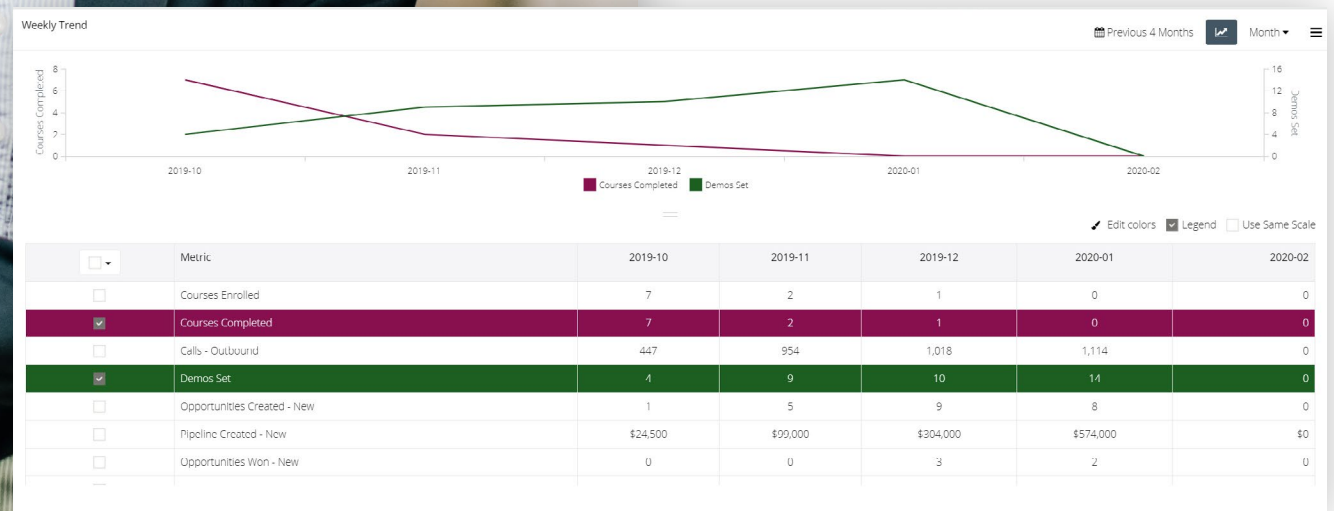




Strengthen onboarding programs.

Finally, scorecards enable sales enablement pros to identify trends that can be valuable inputs for improving the program. For example, if multiple reps take longer than anticipated to achieve one of the milestones, it indicates that the content and approach to preparing them for that milestone needs to be evaluated and improved.

In addition, if the scorecards of established reps show they are missing targets for selling add-on products or services, for example, that could be an indication that onboarding programs need to focus more intensely on cross-selling, so new reps avoid the same fate.





Better onboarding for all!

Effective sales onboarding is critical to giving reps the background, foundation and expectations they need, so that they (much like students) can “make the grade.” Successful programs require a well-planned-out, flexible approach – with the ability to modify elements based on reps’ needs at the aggregate and individual levels, and based on what’s working (and what’s not) in the field.

When an agile onboarding approach is implemented with scorecards, every rep’s progress can be monitored and tracked, so learning issues can be corrected before they become performance problems, and a higher percentage of new reps reach full productivity on time or ahead of schedule. And, beyond all else, that means more onboarding “graduates” will have productive and rewarding careers when they venture out into the real world!



About the Author

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Brainshark

With over a decade of experience as a sales enablement practitioner, Liz has worked every angle of the sales process, as an inside seller, channel manager and enablement leader. Prior to joining Brainshark, she served as vice president of global sales enablement at Turbonomic, director of strategic sales operations and enablement at Qvidian, senior director of global sales enablement and communications at Ellucian, and sales enablement lead at PTC, among other positions. Liz holds a Bachelor of Science from Union College and a Masters of Business Administration from The College of Saint Rose. In her free time she serves in the local community as the President of the Waltham, MA Lions Club.

About Brainshark

Brainshark's data-driven sales readiness platform provides the tools to prepare client-facing teams with the knowledge and skills they need to perform at the highest level. With best-of-breed solutions for training and coaching, as well as cutting-edge insights into sales performance, customers can ensure their sales reps are always ready to make the most of any selling situation.

With Brainshark, companies can: enable sales teams with on-demand **training** that accelerates onboarding and keeps reps up-to-speed; validate readiness with sales **coaching** and practice that ensure reps master key messages; empower teams with dynamic **content** that can be created quickly, updated easily and accessed anywhere; and use powerful **scorecards** to visualize sales performance trends and make real connections from improved readiness to increased revenue.

Thousands of customers – including more than half of the Fortune 100 – rely on Brainshark to close performance gaps and get better results from their sales enablement initiatives. Learn more at www.brainshark.com.