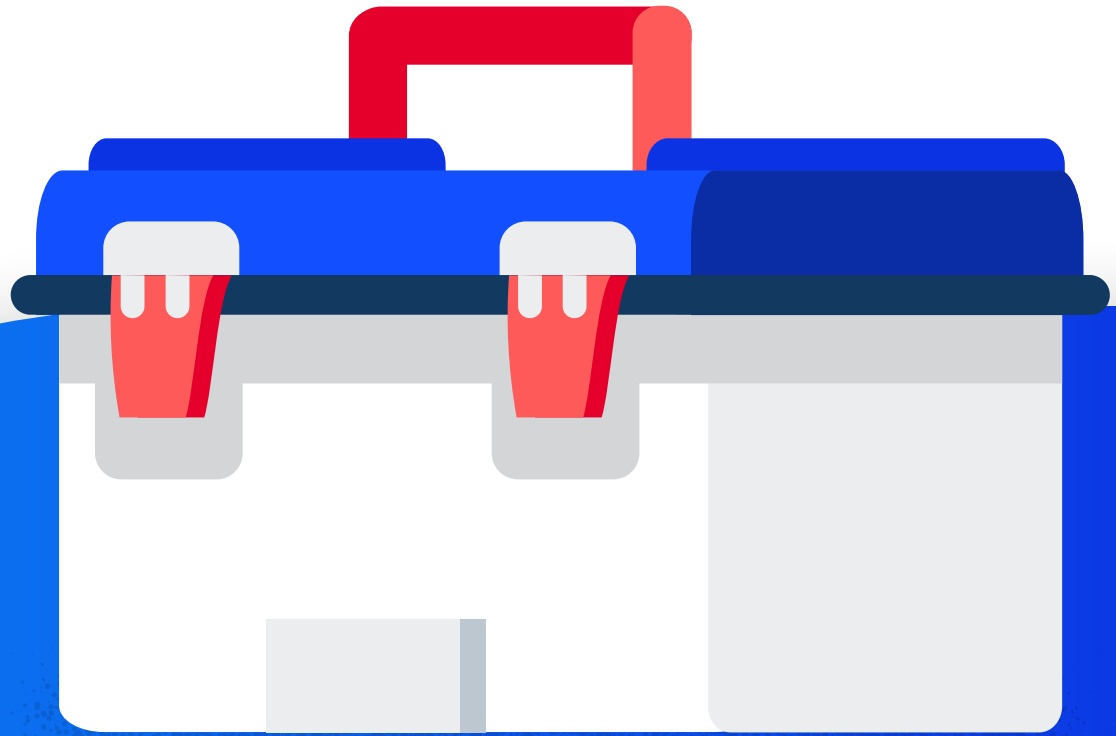
SALES ONBOARDING TOOLKIT



BRAINSHARK

TABLE OF CONTENTS

The Sales Onboarding Struggle... You're Not Alone 3

Onboarding Best Practices 5

How to Speed Up Your Sales Onboarding 7

Onboarding in Action: Case Study with OwnBackup 9

Steps to Better Onboarding 12

Conclusion 14

About Brainshark 15

Introduction

Unlike most corporate training programs, the goal of sales onboarding isn't just to make sure reps complete their training, but to ensure they've mastered it. Helping reps retain information quickly and validating they can use those skills in the field is the ideal scenario for sales enablement and training leaders. Unfortunately, 1/3 of reps still lack proficiency in up to a dozen key selling skills even after sales onboarding is complete, according to the Sales Management Association.

That's a TON of wasted training

That's a TON of wasted training. At best, this leads to slow ramp times for new reps that take far too long to start closing deals. At worst? Sales reps never become productive and you take a huge hit in terms of revenue and retention. For example, it can cost an organization $97,960 just to replace the average sales rep, says a DePaul University study.

Now what? How do you onboard salespeople in a way that actually works?

With sales readiness technology, sales enablement leaders are able to create content, deliver training and conduct coaching virtually, instead of relying on costly, time-consuming in-person training sessions. It also empowers reps to ramp up in a measured fashion and learn efficiently.

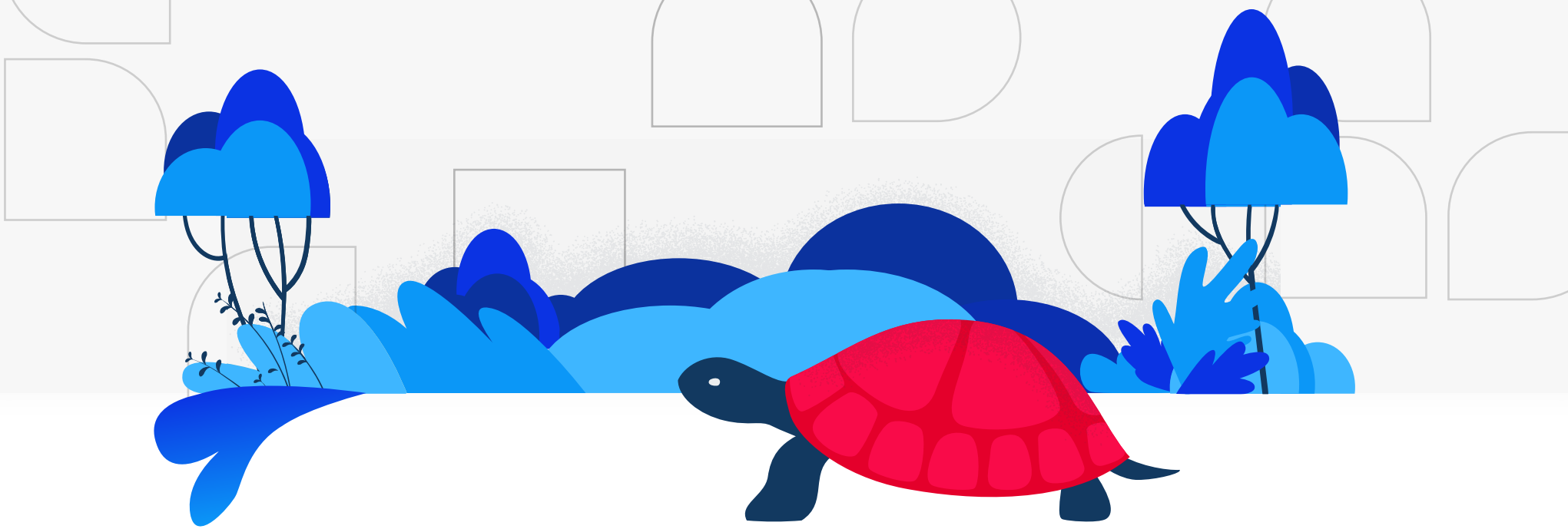
Let's take a closer look at what exactly It takes to create an effective sales onboarding plan for your organization.

The Sales Onboarding Struggle... You're Not Alone

While the first days and weeks of a salesperson's time at your company are critical, it's no secret that onboarding sales reps remains a huge challenge for many businesses.

In fact, a 2018 study from the Sales Management Association (SMA) found that 62% of companies consider themselves ineffective at onboarding new sales hires – this despite it being a key focus area for sales enablement leaders.

First, it is important to understand why most programs don't deliver expected results. It's easy to point fingers, maybe blame your new hires for "not getting it," but the reality is if you have followed the steps to creating an effective onboarding program it should work regardless of the new hire.



But unfortunately, organizations lose 17% of new hires (Society of Human Resources Management) within the first 3 months due to the lack of effective onboarding.

So why, exactly, do so many companies struggle with sales rep ramp-up? The reasons vary, but they often include some combination of the following:

- The onboarding process is slow and inefficient
- The training program structure is largely informal, with most learning being done "on the fly"
- There is no method for assessing readiness; companies push reps out of "the nest" and hope they can fly
- There is no formal measurement of sales onboarding efforts or its results
- Companies over-hire with the expectation that a large portion of new reps will fail
- Companies over-assign quota, leading to unrealistic expectations for new reps

We also know that the costs of poor sales onboarding are no small matter, especially given today's tight sales talent market. The damage under-trained reps can do to customer relationships and business reputations is great, but the effects of high sales turnover and missed revenue opportunities are equally concerning.

So you're not alone, but now what? How can your team work smarter at the beginning of a new sales rep's onboarding to make sure these mistakes don't happen to you?

Onboarding Best Practices

Now that you understand how important onboarding is and why it often fails, it is time to learn how to create an effective sales onboarding program and avoid these common pitfalls. This will result in better retention, more productive reps and a culture of success.

1. **Offer multiple learning methods**
   Traditional onboarding methods, such as in-person sessions and the old 'fire-hose' approach, aren't enough for today's sales forces – and in some cases, they are totally ineffective. Reps today want to learn in different ways – whether it's via video, microlearning or a mix of formats.

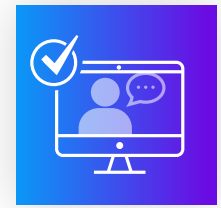
   Offering multiple learning methods and formats can not only make onboarding more engaging, but it can also help training material stick while appealing to the learning preferences of your new reps.

2. Design curriculums focused on key sales activities

When a new rep comes on board, it can be overwhelming not just to them, but to the sales organization and the sales enablement team in charge of ramping them up. There's a lot to learn in a short period of time, like product and company information, key messaging, competitive differentiators and the sales methodology, to name a few. When the information new reps need to know is organized in courses and curriculums; compiled by due date, completion criteria and more, it helps keep reps on track.

3. Empower reps and managers to monitor progress

Making sure reps stay on track with their training and ensuring they've taken enough time to ramp up before they start interacting with buyers can be a challenge. It is important for reps and managers to monitor progress throughout all onboarding activities. Being able to monitor progress adds a level of accountability for both new reps and managers when it comes to keeping the onboarding process moving and certifying that all skills and knowledge have been mastered when it's time to start selling.



4. Assess readiness with quizzes, coaching and more

New reps may be on track to complete their training during the onboarding process, but how can sales managers know their comprehension or whether they can apply it properly when they start selling?

What it comes down to is assessing (instead of guessing) reps' readiness. Adding an assessment component into onboarding, not only allows you to know whether reps have completed their training, but you can also validate that they've mastered it.

Assessments can take on several different forms, including:

- Quizzes
- On-the-spot knowledge-checks
- Video coaching assessments

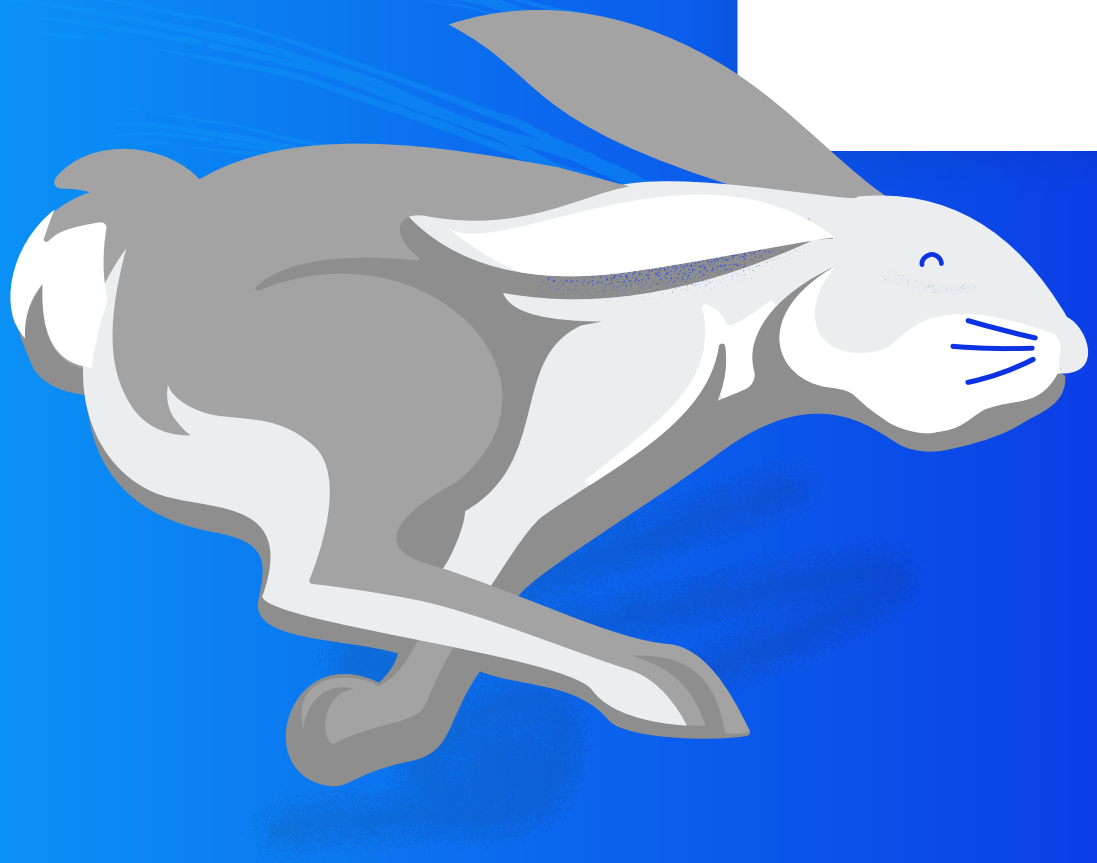
For a deeper dive on onboarding best practices, check out the following resources:

eBook: The Brainshark Agile Sales Onboarding Methodology

Blog Post: 4 Onboarding Best Practices (and How Sales Readiness Tools Help)

Brief: 5 Tips to Create a Virtual Sales Onboarding Program

How to Speed Up Your Sales Onboarding



You understand the problem, you know the best practices to get your sales reps up and running. But now you're thinking, "That's great, but how long does this take? I have to get results at some point."

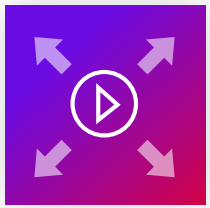
When onboarding is fast *and* effective, it can reduce ramp times by 3.4 months and improve quota attainment by 7% – making speed an especially critical part of your new hire training approach.

It's sales enablement's job to not only design an onboarding program that delivers the right skills and knowledge, but to make it an efficient process that decreases time to productivity and gives you the best chance at achieving sales goals.

Check out 4 helpful tactics for accelerating sales onboarding in any organization.

1. **Start onboarding sooner**

   Onboarding typically begins on the new hire's first official day with the company. A speedier onboarding strategy would include "preboarding," which gets sales learning started before Day 1, giving reps a chance to hit the ground running during that critical first week.



2. **Make microlearning a priority**

   Microlearning courses improve knowledge retention by delivering new information in a series of "bite-sized" chunks, such as short videos, animated presentations, and infographics. This makes the learning more consumable (and retainable).

3. **Shadow A-players**

   Peers can be priceless resources for new salespeople. They know your organization well and have already spent months (or years) selling in your target markets. Top reps can record short, informal videos describing something as simple as an effective cold-calling strategy or how they won their biggest deal. The best examples are often a great supplement to formal training content!

4. **Gain insight into your onboarding process**

   Time to productivity is an important measure of sales onboarding success, but it's also a lagging indicator. Knowing whether your program is working right now will help you course-correct sooner – and avoid waiting months to realize that new reps are struggling. Instead try leveraging onboarding data in a few ways:

- See which training courses are being viewed, and for how long, to understand what is (or isn't) working.
- Track the learning progress of individuals and teams, ensuring sales hires complete required courses and assessments on time – and that managers are holding each accountable.
- If your reps are consistently struggling with certain skills (e.g., objection-handling), you can review and re-calibrate related training as needed.
- Generate Readiness Scorecards to gain greater visibility into the sales activities of new reps making it easier to identify performance challenges that need to be readdressed with additional training, while providing insight into how new rep output is measuring up with that of others on their teams.

Own{backup}

"All of us working remotely requires a different strategy to our L&D approach. With Brainshark Coaching, reps can roleplay specific exercises and content and demonstrate mastery of the knowledge that they learn thereby reducing The Forgetting Curve significantly. Most importantly for our managers, it gives them an opportunity to mindfully give constructive feedback at their pace."

—

Thomas K. Cheriyan
Director of Sales Enablement
OwnBackup

Onboarding in Action:

How OwnBackup Scaled Onboarding & Readiness to Meet the Demands of Rapid Growth

OwnBackup was experiencing rapid growth, and for Thomas Cheriyan, head of sales enablement, that meant addressing a series of challenges across the field sales organization. New reps were typically onboarded at in-person boot camps and then received manager-led training. However, the latter process was up to each sales manager, leaving too much variation across new reps' learning paths and ramp-ups that took too long.

The sales team also relied on Google Drive to store all its training and content, including Zoom recordings of meetings, playbooks, and battlecards, but this static platform didn't allow for an easy way to train and coach reps, identify skill or knowledge gaps, or measure rep readiness.

When the COVID-19 pandemic hit, reps were forced to shift all their face-to-face meetings to virtual overnight, requiring immediate new skill sets. To improve readiness, Thomas knew it was time for a sales readiness platform.

Solution:

Thomas identified Brainshark as a solution that could help him standardize onboarding, create and manage training materials, and give reps a way to practice skills via video coaching.

[Learn more about OwnBackup's onboarding strategy in their own words here.]

Brainshark allowed for more flexibility so Thomas and subject matter experts could easily create training and update content as needed. He could also empower sales managers to use Brainshark's coaching tool to establish a continuous feedback loop with reps and facilitate practice for virtual sales meetings. The result of this is known internally as "OwnBackup University," with over 30 courses and growing!

The Brainshark Advantage:

Halfway through 2020, OwnBackup's sales team began doubling its headcount (30+ reps each quarter) to meet the demands of its swift growth. Thomas said Brainshark is a key component in this initiative. "Our investors were pleased to see that we've capitalized on a platform to scale our L&D efforts and truly be able to measure the effectiveness of our sales force."

All new sales hires now use Brainshark for all their training needs, even before their first official day. Thomas says this has strengthened the onboarding boot camp sessions because reps can take introductory courses in Brainshark, so they're prepared before they attend.

Onboarding with Brainshark has worked so well that the company is seeing a faster return on investment for new sales reps with many closing deals within their first month. According to Thomas, "We now have a scalable process for ensuring our employees are genuinely owning OwnBackup messaging and knowledge." And word has spread; other departments across OwnBackup will be using Brainshark for new hire onboarding as well.

Existing sales reps leverage Brainshark for all training courses pertaining to products, messaging, sales skills, and processes. Training content can be updated over time and accessed on-demand, which takes the pressure off technical staff and managers to train reps, so they can spend more time assisting with deals and working toward company objectives.

When asked about the effectiveness of courses in Brainshark, one OwnBackup rep had this to say "Making my way through the Backup & Recovery

"We now have a golden repository of content with Brainshark, which is key for new hires that need to ramp up quickly but don't have the benefit of learning from their colleagues directly in a physical office setting."

—

Thomas K. Cheriyan
Sales Enablement Manager
OwnBackup

course right now, and it's a great refresher on the core product! I highly recommend the Archiver course, which I took part in during the pilot, which has a ton of new information, even for more seasoned account executives."

Prior to using Brainshark, OwnBackup's sales managers didn't have an easy way to review rep performance. With Brainshark's video coaching tool, managers can deliver continuous feedback to reps and better assess their teams' readiness. Brainshark's Machine Analysis, which automatically reviews their videos for filler words, rate of speech, and facial expressions, has been crucial since the pandemic, as most selling is now taking place via Zoom. According to Thomas, "we've had more feedback being delivered and received over the past two months with Brainshark, than within the last five years."

In the first five months, 1,225+ coaching videos have been recorded & reviewed

In the first five months, over 1,225 coaching videos have been recorded and reviewed. And with Brainshark's leaderboard, reps can see how their performance compares to others and review examples of 'what good looks like.'

Moving forward, to keep reps engaged with Brainshark and promote a culture of learning, Thomas is running the Brainshark Elite Status perks program. Within the program, if all sales teams complete 100% of their assigned courses and coaching activities by the end of 2020, they'll earn points toward prizes like a free Airbnb virtual experience.

OwnBackup is a cloud-to-cloud backup and restore vendor, providing secure, automated, daily backups of SaaS and PaaS data, as well as sophisticated data compare and restore tools for disaster

Results & Value:

- Faster and scalable return on new hire investment; many new hires close deals within first month
- 1225+ video coaching submissions have been created and evaluated with Brainshark
- Other departments will be using Brainshark for onboarding and training (customer support, engineering, HR, and alliances)

Readiness Triggers:

- Lack of structure for sales training and content; hosted in Google Drive
- Inconsistent onboarding paths; left up to sales managers
- Pandemic forced reps to shift to all virtual sales meetings

Steps to Better Onboarding

It's time to get started! Here are some steps to revive your onboarding process and get reps performing and quickly. The steps are below, and you can get the whole picture here.

Step 1: Establish Your Onboarding Timeline
Consider how long you want the onboarding process to take. We recommend that your timeline mimic your sales cycle.

Step 2: Create a list of Required Competencies
List the competencies your new salespeople need to develop. What do reps need to begin having conversations with prospects? What do they need to advance a deal to the next stage?

Step 3: Categorize Competencies into Buckets

Once you've listed the competencies reps need to be successful, it's time to split them into categories, or buckets. You should choose enough buckets to structure your content, but not so many that it becomes too confusing for new reps.

Step 4: Sequence Training Delivery into Phases

Using the buckets, you defined earlier you can now chart a sequence for each one. The goal is to deliver your training in a way that new reps can be productive throughout onboarding. Opposed to having to finish the program before starting selling activities.

Step 5: Select an Evaluation Method

Determine how you are going to measure the success of your reps throughout the onboarding program.

Step 6: Onboarding Content Checklist

Content creation can often feel like the most difficult step in the entire process. Fortunately, you aren't starting from scratch, you have already determined the topics you need to cover. And always remember the best sales onboarding content is engaging, interactive and video based.

Here's a checklist with things to consider as you build out your content:

☐ **Pre-Boarding:**

Pre-boarding is a helpful way to ease new hires into the onboarding experience before their official start dates.

☐ **Buyer Personas:**

The better new reps understand who your buyers are and what they do, the faster they can build productive client relationships.

☐ **Product Training:**

It's important your product training doesn't overwhelm new hires with long-winded presentations on minute details. Instead, use microlearning content to introduce sellers to the product in "bite-sized" pieces they can easily consume and remember.

☐ **Competitive Differentiation:**

Reps need to understand your company's main competitors, including the strengths and weaknesses of their offerings. They should also know how to differentiate your solution(s) from alternatives in the market – in terms of product value, pricing or add-on services that a competitor may not offer.

- [ ] **Territory and Account Planning:**

Sellers' abilities to understand their target accounts and the market factors affecting them is critical. But because these topics may not have reps bursting with excitement, keeping them engaged with relevant, practical info is key.

- [ ] **Pre-Call Planning:**

Ensure that your sellers know how to find sales content that would be relevant to the call. For example, if the buyer is a financial services firm, explain where reps can find finance industry testimonials, case studies or research in your sales content library

- [ ] **Prospecting:**

Whatever strategy new reps have for prospecting, they still need an approach that works with your client base. Because prospecting involves a wide range of sales activities – like social selling, buyer research and cold-calling.

- [ ] **First Sales Interaction:**

New reps need to be ready to ask the right questions, think on their feet, and keep their composure in front of a buyer they (probably) haven't met before.

- [ ] **Demo Call:**

The demo call really comes down to two skills: presentation and storytelling. (OK – product knowledge doesn't hurt either.) The content and sales messaging both need to be engaging. Otherwise, reps risk putting your buyers to sleep with a long, feature-heavy demo.

- [ ] **Follow-Up:**

Training content should cover proper etiquette for follow-up cadences and tips for avoiding the dreaded "no-decision" outcome. When it comes to negotiations, you'll want to ensure reps are able to protect the value of a sale and highlight the advantages that only your solution provides.

For a deeper dive into these tips, check out The Blueprint for Better Sales Onboarding.

Conclusion

62% say they're ineffective at onboarding new sales reps

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Source:
Sales Management Association.

Getting a sales rep ramped up is no small feat: there's product knowledge, sales methodologies, and even a learning curve with how to use the company's CRM. It's just too much information to absorb all at once, which only makes it that much harder (and slower) for new hires to become competent, productive salespeople.

Sixty two percent of companies say they're ineffective at onboarding new sales reps, according to the Sales Management Association. The good news is with a better understanding of challenges, a review of best practices, you're well on your way to gaining an advantage and being one of the 38 percent who's onboarding effectively.

Want to learn more about sales readiness technology?

See a Demo: www.brainshark.com/see-a-demo

Contact Sales: www.brainshark.com/contact-sales

About Brainshark

Brainshark's data-driven sales enablement and readiness platform provides client-facing teams with the knowledge, skills and resources 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.