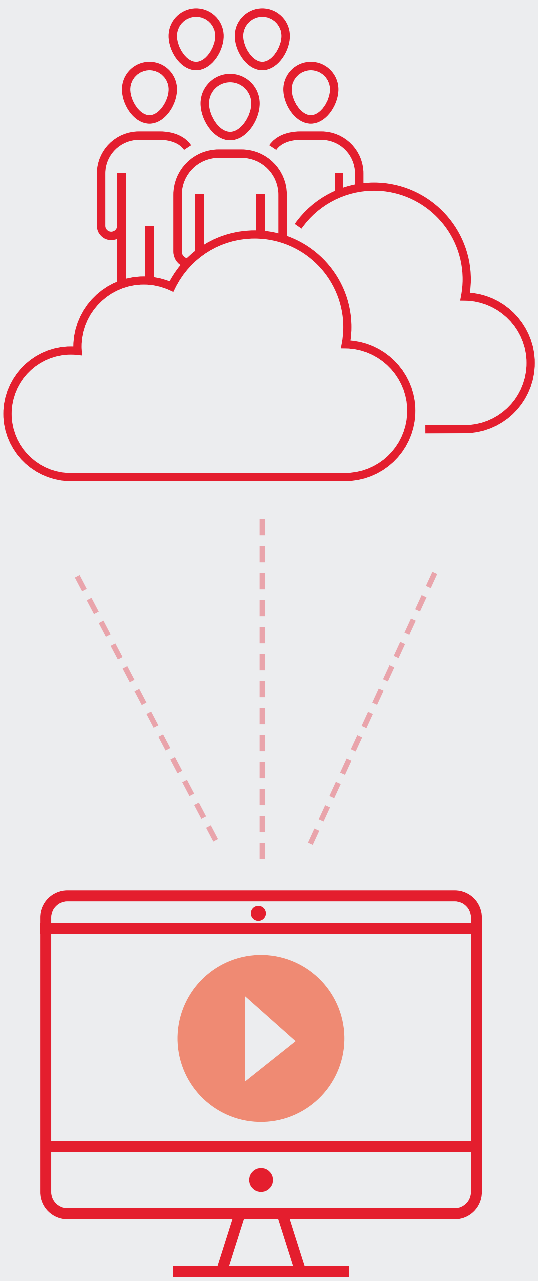
BRIEF

5 Tips to Create a Virtual Sales Onboarding Program



Is your company now facing the reality of a 100% remote workforce?

Even as your work environment changes, most key initiatives won't stop – such as hiring new sales reps. As new hires join your company, **they'll need to be onboarded,** which means you need to quickly adjust your program for a virtual workplace.

In this brief, we'll provide tips for how to create a virtual onboarding program that trains and prepares new sales hires, without interruption, as if they were working in a typical office environment.

CREATING A VIRTUAL ONBOARDING PROGRAM

1 Collaborate with key stakeholders

Normally, a new sales hire, regardless of their location, would come into company headquarters for the first few days or week on the job. Without being able to visit the office, the usual orientation activities need to be organized and conducted virtually so the rep is ready to go on day one.

To get this done efficiently, it's important to collaborate with stakeholders from key departments:

- **IT:** Make sure IT delivers computers, headsets, monitors and other hardware to the new hire at home in advance of their first day. Provide a list of the necessary software (CRM, instant messaging, video conferencing system, sales tools, etc.) that needs to be set up on the rep's computer, based on their role. Then organize a virtual meeting between IT and the new hire early on day one to go through computer set up.

- **HR:** Ensure that the new hire meets with HR on their first day to go through benefits and other relevant information and complete any necessary paperwork. Encourage the rep to do a video call so they'll recognize their HR rep when they're back in the office.

- **Sales**: Since there's no one to walk the rep around and introduce them to everyone, the new hire's manager should begin the day by setting expectations and reviewing the schedule for week one.

  The sales manager can then pre-populate the new hire's calendar with team video calls and introductions to key players and sales enablement. If you'd normally take the new hire out to lunch, consider sending them a restaurant or food delivery gift card so they have lunch squared away on their first day.

- **Executive team:** Let the executive team know who is starting and when so they can send a welcome note to introduce themselves.

- **Swim buddies:** Assign each new sales rep a 'swim buddy;' this can be a colleague on their team or somewhere else inside the sales organization who will be their go-to for commonly asked questions and to support them throughout their ramp up period. Encourage this person to be available online and via phone for the new rep.

Be sure to have this group meet periodically to agree on the week one schedule for new hires and the roles and responsibilities of each department, so there's no confusion about who's doing what and when.

2 Prep new reps with pre-boarding materials

Before reps officially join your company, it's a good idea to send them a pre-boarding learning package to give them an idea of what to expect once they start. This can happen any time after the rep signs on the dotted line and can include:

- **An introductory video from your executives** featuring the company mission and goals and what they value most as leaders

- **Welcome videos** from your sales enablement team, the rep's team and other key colleagues

- **A rundown of what they can expect on day one** with an agenda, upcoming team meetings, an org chart of their team (including pictures and phone numbers for each person), as well as contact information for the sales enablement team, HR and IT

- **An overview of your company** with basic, need-to-know details around your products and services and summaries of your value proposition, target industries and buyer personas

Brainshark makes it easy to send out these materials as engaging video presentations with supporting material attached. You can track whether new hires have viewed them before day one and include simple quiz questions at the end of each presentation to assess comprehension.

3 Enable sales managers

Onboarding is a collaborative process – especially when done virtually. Sales managers need to be enabled to receive the handoff from sales enablement and continue ramping new hires remotely all the way to full productivity (in case the remote work arrangement lasts that long).

To make the process easier for sales managers, it can help to provide them with a package that includes a week-by-week guide, including:

- **A schedule for the rep's first day and weeks** (that they can also provide to the rep)
- **Virtual meetings that the manager should set up for the rep,** such as daily one-on-ones during the first week, introductions with sales leaders and other important colleagues and shadow calls with veteran reps
- **Templates for productive online meetings**, including what to go over in the first few one-on-ones, such as an introduction to the team and its structure, an overview of the sales strategy, etc.
- **A checklist of miscellaneous items** including setting up the new hire in appropriate online groups (Slack channels, Salesforce Chatter, Microsoft Teams groups, etc.) and programs that IT may not manage (LinkedIn Sales Navigator, etc.)

4 Adjust training and coaching approach

Previously, new reps might attend onboarding boot camp, where in-person sessions are packed into a few days. With new reps starting off at home, here are a few ways to adapt your training and coaching activities for virtual onboarding:

- **Break down your training curricula into smaller, virtual courses.** Adapt in-person sessions and existing eLearning courses into 5-7 minute, on-demand training modules. Only release a few at a time to ensure the rep has mastered each part of the program, before moving onto the next (also known as an agile onboarding approach).

  This strategy helps identify any need for clarification before reps are in too deep. With a sales readiness platform like Brainshark, you can easily create bite-sized, eLearning content that reps can refer back to at any time and enhance it with attachments, quiz questions and polls.

- **Have SMEs contribute remotely.** Where you'd normally have subject matter experts (SMEs) come in to present at onboarding boot camp, they'll now have to switch their material to an online format.

  A sales readiness platform can help; guest authoring capabilities allow you to build (or upload) content and then request a voiceover from the appropriate person. You can also incorporate videos of SMEs or executives or put a speaker video alongside a slide presentation to provide a similar experience to in-person onboarding.

- **Make experiential learning activities virtual.** Typically, in conjunction with onboarding courses, reps would meet with managers for in-person coaching sessions or role plays to ensure that they're absorbing the material and can apply it. With a remote work arrangement, you can instead ask reps to record a short video, such as delivering a one-minute elevator pitch. A video coaching tool makes this simple – you can assign a coaching activity remotely, have the rep submit their response via video (from their webcam or mobile device) and then score it and provide feedback. That way, you can see *and* hear their comprehension without being in the same room.

You can also facilitate shadowing by pairing new hires with veteran reps and identifying sales calls that will be good learning opportunities. Before and after each call, have the reps meet via video chat to discuss goals of the call and key takeaways.

- **Send a simple, 3-question survey** at the end of each day during the reps' first week, asking them to rank their onboarding experience on a scale of 1-10, what could be improved and sharing their best learning experience of the day. (This is also something that can be done via a sales readiness tool!)

5 Review and improve your program

As new reps move through the program, check in with them after their first 48-72 hours on the job (and periodically throughout onboarding). Ask for feedback on what they've learned so far and whether they have any questions.

Do a formal recap with your sales enablement team at the end of each week, as well as cross-functionally, to see how the reps and program are performing, identify areas of improvement and see what else can be added.

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

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