The BLUEPRINT for Better Sales Onboarding

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Power your content. Power your sales.™

INTRODUCTION

Companies often take a firehose approach to onboarding new sales reps, thinking the faster they can send everyone through training, the faster they can get them out in the field selling.

The problem is, salespeople need to learn a lot before they can be considered fully ramped up: there's product knowledge, sales methodologies – even 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.

Unlike most corporate training programs, **the goal of sales onboarding isn't just to make sure reps complete their training, but to ensure that they've mastered it.** Helping reps retain information quickly and validating that they can demonstrate those skills in the field is the ideal scenario for sales enablement and training leaders – and it takes a plan.

This eBook provides the blueprint to better sales onboarding, broken down into 6 steps, along with details on how technology can support your program along the way.

**NOTE: This document does not cover corporate/HR orientation subjects like company policies, building access, and IT-related topics.*

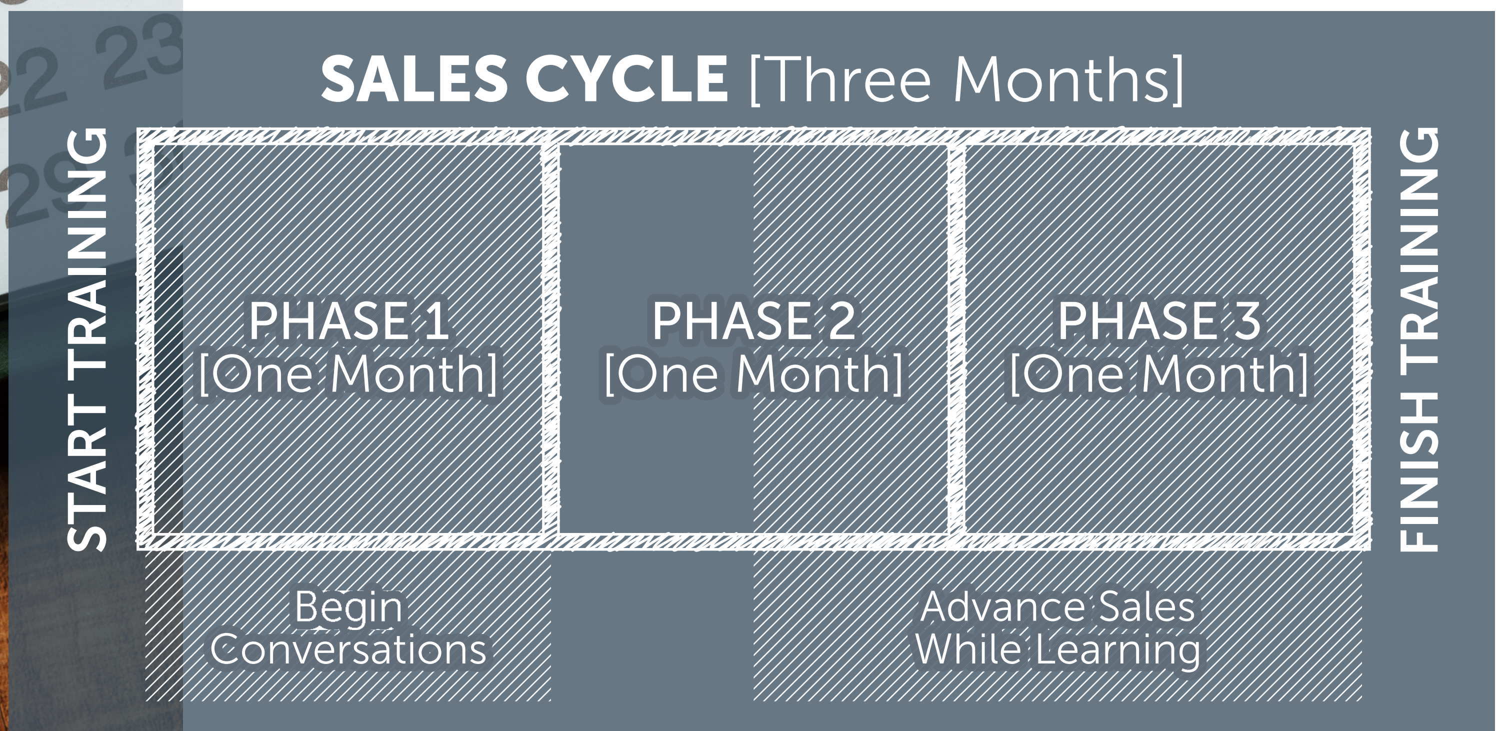
STEP 1 Establish Your Onboarding Timeline

First, consider how long you want the onboarding process to take. **We recommend that your timeline mimic your sales cycle.**

The goal is for a rep to begin having conversations with prospects as soon as possible, with additional training coming as needed. So if you have a three-month sales cycle, you may want your reps to be fully onboarded in three phases, with each phase lasting one month.

Of course, this timing will vary by company, from phases that take several months to only a few days or weeks to complete. **The key is to identify the phases that make sense for your company and the sales roles you're training for.**

For the purposes of this eBook, we'll use an example of three months, with each phase lasting one month (see graphic below).



STEP 2 Create a List of Required Competencies

The next step is to 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?

Create a list of everything they need to know and do, and what they need to master to be effective in their roles.

As an example, this graphic provides a sample list of potential sales competencies.

Healthcare Solution	Excalibur 5500	Closing the Deal	Sales Stage 2	IT Solution	Price Book	Pitch Deliver & Messaging	Financial Services Solution	Sales Stage 3
Tracking Leads in CRM	Involving Solution Consultants	Managing Accounts	Creating Opportunities in CRM	Sales Stage 4	Creating Contacts in CRM	Competitive Intelligence	Logging Activities	Finding & Editing SOWs
Sharing Content	CRM Analytics	Product Positioning	Skylar 2290	Discovery Questions	Product Demos	Contracts	Writing Proposals	Identifying Prospect Objectives
Fact Sheets	Syncing Email with CRM	Videos to Share	Sales Stage 1					

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.

Buckets will vary for each company, but let's take a look at a common set using our three-month example. In this case, we have **6 buckets for reps to start with**: sales process and stages, solutions offered, tasks of the role, ins and outs of the CRM, sales methodology, and collateral available.

Solution	Tasks	CRM	Method	Content	Sales Process & Stages
Financial Services Solution	Finding & Editing SOWs	Tracking Leads in CRM	Pitch Deliver & Messaging	Competitive Intelligence	Sales Stage 1
Excalibur 5500	Writing Proposals	Creating Opportunities in CRM	Product Demos	Fact Sheets	Sales Stage 2
Healthcare Solution	Involving Solution Consultants	Syncing Email with CRM	Product Positioning	Price Book	Sales Stage 3
Skylar 2290	Sharing Content	Creating Contacts in CRM	Identifying Prospect Objectives	Videos to Share	Sales Stage 4
IT Solution		Managing Accounts	Product Positioning	Contracts	
		CRM Analytics	Closing the Deal		
		Logging Activities			

TIP: Some training items might overlap – and that's OK! – but you should be able to break the majority of training items into one bucket. If you can't, that's a sign that you may need to reconsider your categories.

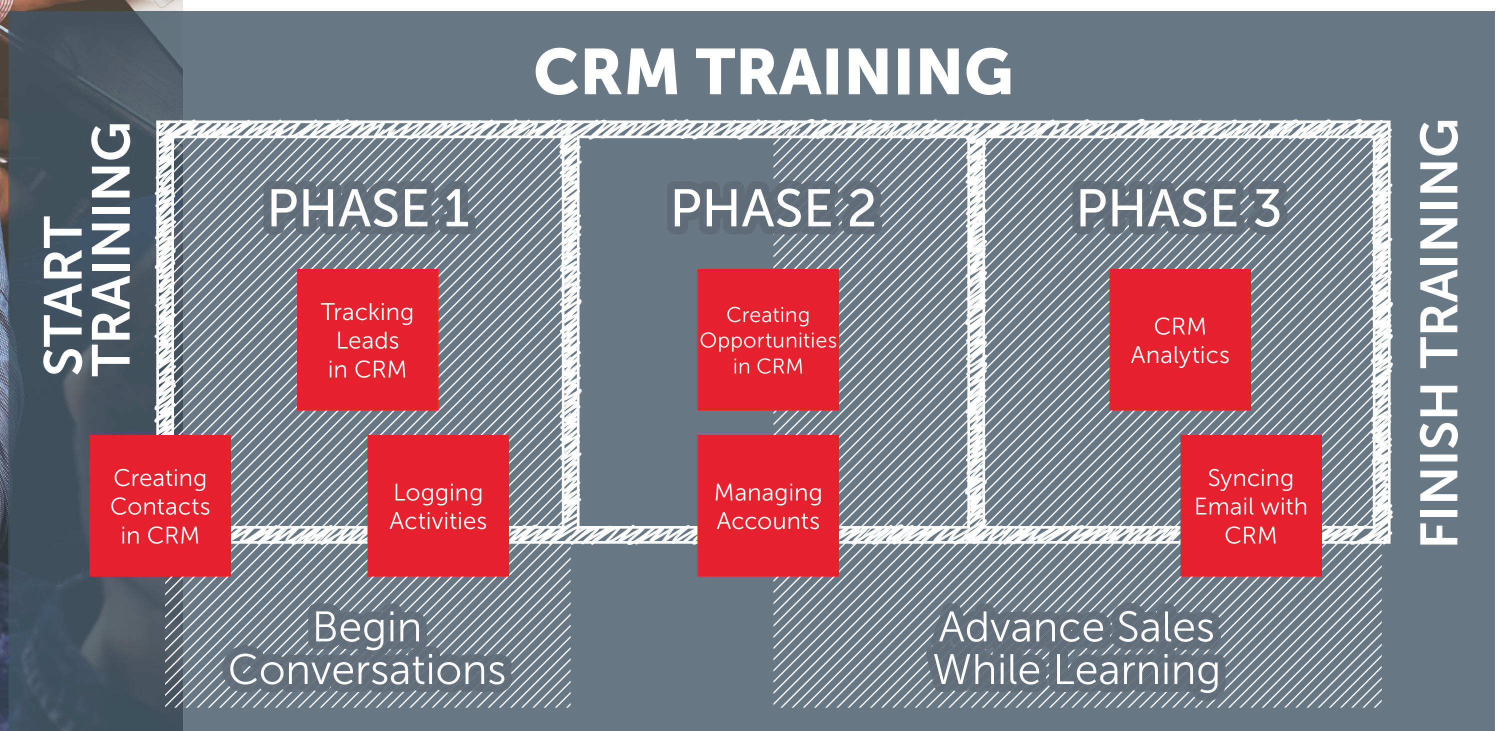
STEP 4 Sequence Training Delivery into Phases

Now that you have your buckets, you can chart a sequence for each one. Remember: **the goal is to deliver your training so that new reps can be productive throughout the onboarding process**, rather than having to get through the whole program first before they begin selling activities. So instead of training on each bucket all at once, you can assign specific items in each bucket to the appropriate phase.

For example, let's consider our CRM bucket. CRM systems can be complex, and each area within the CRM requires training. But reps don't need to know everything about the CRM in order to begin selling. So what do they need to learn right away?

Your approach might look something like the example below (see graphic).

TIP: Consider what reps will need to learn in Phase 1, knowing that more training will come later.



STEP 5 Select an Evaluation Method

You'll also need to assess **whether or not reps achieved the competencies for each phase**. A multiple-choice-type test will measure whether or not they learned the material, but it doesn't mean they've mastered it.

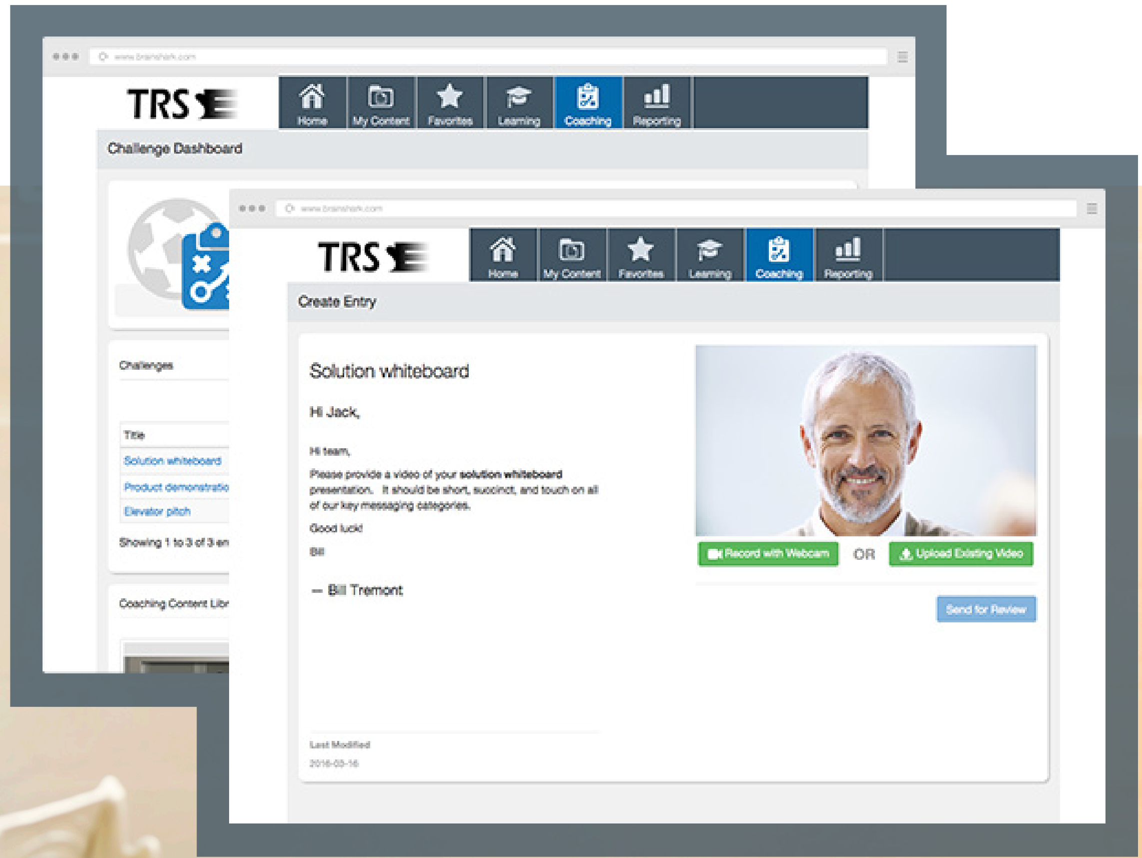
Sales coaching is a great way to help reps practice what they've learned and validate that they are ready to demonstrate those competencies in the field.

TIP: Brainshark's coaching technology provides an easy way to deliver virtual sales coaching. For example...

Let's say an important milestone for Phase 1 is to demonstrate mastery of a solution whiteboard:

1. You or the sales manager can use Brainshark to issue a challenge for reps to demonstrate the pitch.
2. Salespeople can record themselves with their mobile device or webcam, and submit the video recording for review.
3. You or the sales manager can then review the videos and provide feedback to sharpen each rep's performance.

In this scenario, the reps can keep practicing until they've mastered the pitch – at which point you'll know they're ready to move on to Phase 2.



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STEP 6 Develop Your Onboarding Content

Once you've got steps 1 through 5 mapped out, it's time to tackle content. While content creation for all this training might seem daunting, the good news is that you aren't starting from scratch; you now know the topics you need to cover, and when.

TIP: The best sales onboarding content is engaging, interactive and video-based. [Brainshark's content authoring](#) capabilities make it easy to develop this type of content yourself. You can simply upload PowerPoints, PDFs and other assets, then add your voice-over to create your own video learning asset.

Brainshark content can also include interactive quizzes and surveys, predetermined completion criteria and automated certifications. Your training content can be delivered on-demand via a formal onboarding environment, or made available for reps to view continuously as needed from a content portal, or even your CRM.

Want to learn more about sales onboarding technology?

Visit us: https://www.brainshark.com/
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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.