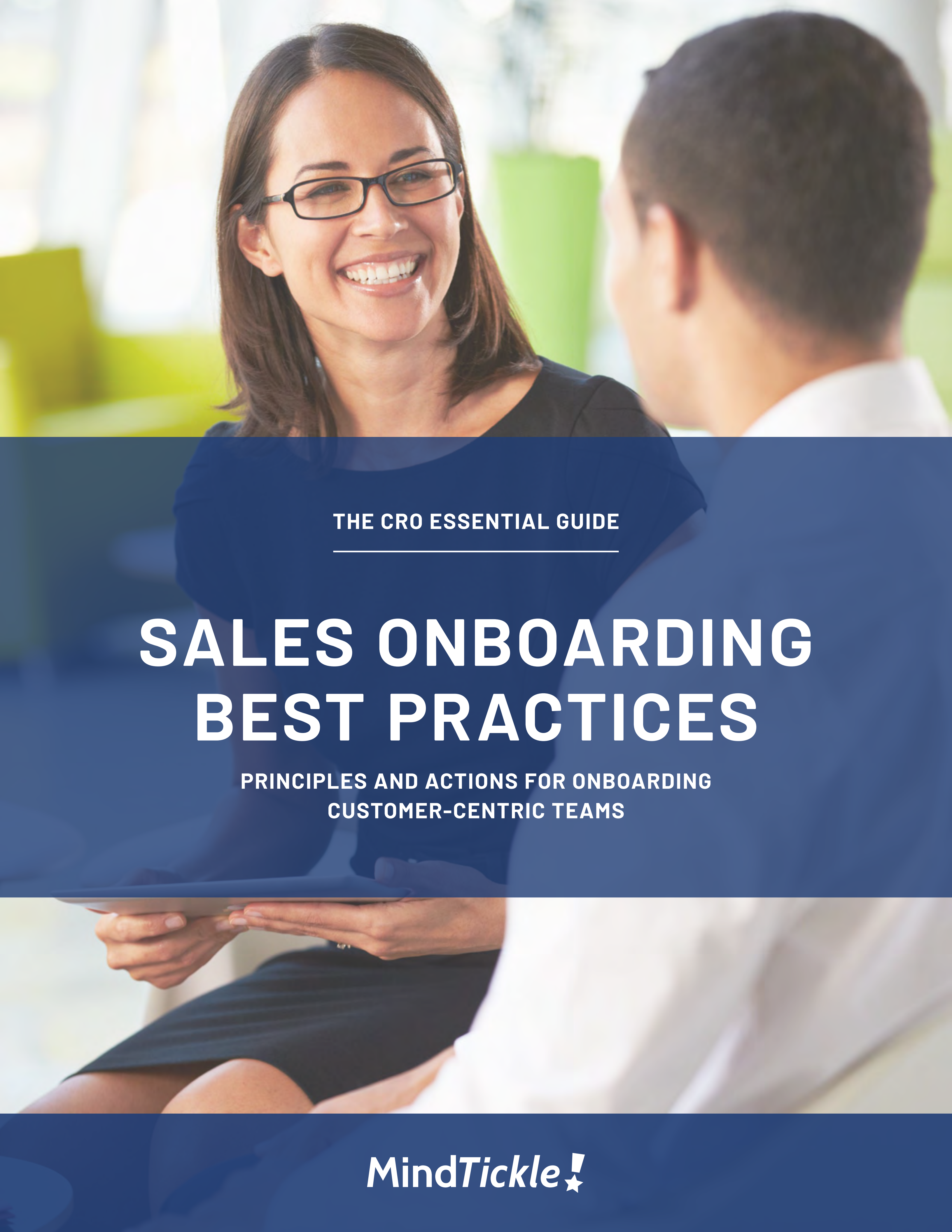


THE CRO ESSENTIAL GUIDE

SALES ONBOARDING BEST PRACTICES

PRINCIPLES AND ACTIONS FOR ONBOARDING CUSTOMER-CENTRIC TEAMS

MindTickle

INTRODUCTION

According to a recent study, effective onboarding services that meet or exceed expectations can improve quota attainment by 16.2%.* This reinforces the mantra that effective new hire onboarding is central to any sales readiness strategy designed to improve productivity.

Human resources and training departments are often tasked with the implementation of onboarding programs. While these programs work well for integrating new employees into a company and its culture, CROs need to take control from Day 1 of the outcomes important to them—building and maintaining sales-specific behaviors that provide insight and perspective to customers in order to drive value, while ensuring the sales process is aligned to the customer's journey. So, how do CROs quickly and predictably implement a system to ramp new sellers that drive deals to close faster and more profitably?

The answer shouldn't be limited to a cookie-cutter list of activities. While every company has its own version of an onboarding checklist, the head of revenue needs to first consider a set of guiding questions and principles aligned with the strategic interests and realities of the business before pursuing an onboarding plan. The 3 principles below represent a few of MindTickle's learnings and observations from working with revenue leaders across a wide spectrum of companies.

Effective onboarding services that meet or exceed expectations can improve quota attainment by 16.2%*

* Source: CSO Insights Sales Enablement Report 2018

1

GUIDING PRINCIPLE

Onboarding without a destination in mind and a team in place makes for an incomplete journey.

Taking 'Onboarding' literally for a minute, think about your new sales hires as passengers eager to get underway. Your plan for a safe, punctual ride must begin well before the plane or train pulls up to the gate. Here are questions to ask yourself:

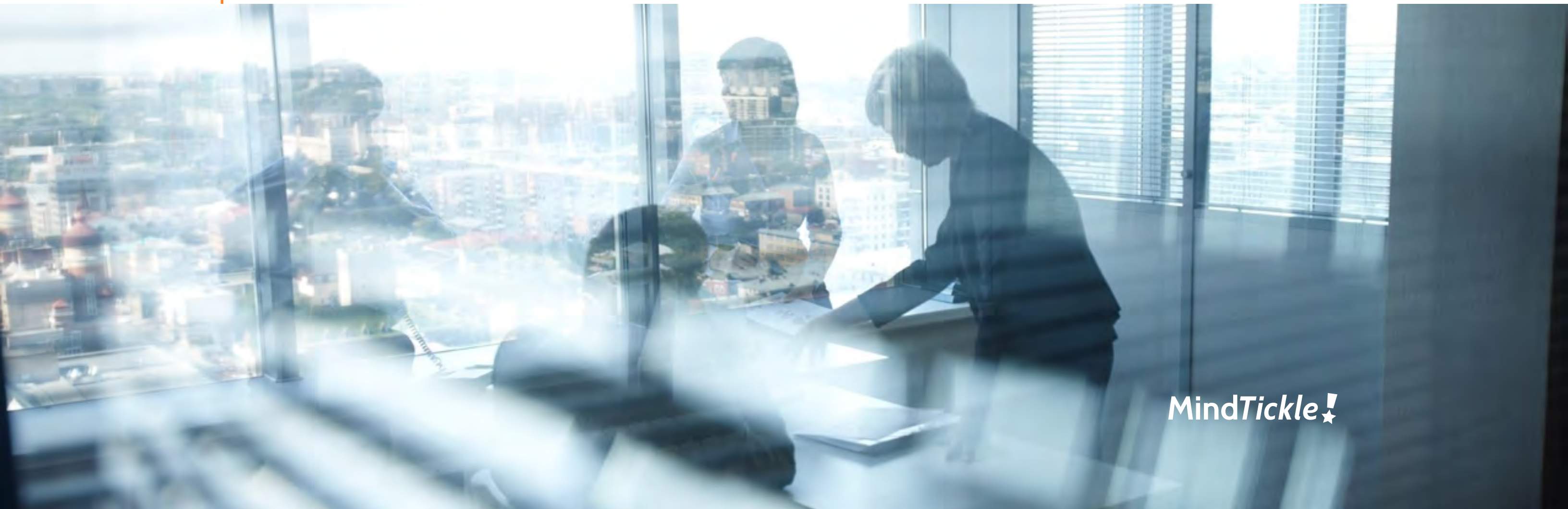
- Do you have the right team in place to offer an efficient and effective onboarding experience from jetway to seat? Do they have the right experience, skillset, mandate, incentives, objectives and most importantly, the tools to ensure that the initial onboarding experience continues well into the flight (aka the seller's journey)?
- What can you learn from your organization's current or historical onboarding programs? Were they designed with your current sales strategy in mind? If so, did they deliver the expected outcomes?

Work with a representative subset of your sellers for a bottom-up view from the people the onboarding programs are designed to help.

- Every sales team falls along a distribution curve of top, middle and bottom performing sellers. Spend time with folks at all levels of the performance curve for insight into their onboarding experience and any correlation to confidence or ramp time. This also helps you evaluate if you have the right people, platforms and resources in place.
- Create a basic competency chart that aligns the top 2 or 3 behaviors you have identified as critical for sellers and see if your top performers exhibit them in the field consistently.
- Observe and analyze your top seller's industry knowledge, customer-engagement skill set, relationship building and networking skills. Then map these map it back to their onboarding activities and content, KPIs and ramp time to productivity.

ACTION ITEMS

- [ ] Conduct a working exercise with your onboarding team to evaluate current onboarding activities and content and how those align with target competencies.
- [ ] Identify core knowledge content and preparation gaps in the onboarding process (Example: you consider value-selling and trust building key facets of your top sellers’ ability to close deals more quickly, but there are no programs focused on these skills in the first month of onboarding).
- [ ] Leverage the wider team’s experience and network to identify resources and assets, some of which may be internal like your current sales and customer-facing teams, or external to the organization. Examples would include customers, partners or colleagues at other organizations.
- [ ] Evaluate the current onboarding experience for your new seller with a focus on core competitive advantage, revenue organization strategy, product, training and content.
- [ ] Design, build, evolve and elevate your initiatives to target specific training outcomes (e.g. sales enablement personnel, training and content development and technology support).



2

GUIDING PRINCIPLE

Make measurable, field-ready skills the outcome of onboarding

Map your onboarding program to the skills, assets, processes and content that enables winning behavior.

- Align the onboarding process with the behaviors and corresponding competencies that will enable every team member to execute your current and long-term revenue strategy.
- Within your blueprint for your onboarding process, the framework should focus on the knowledge areas that are mission critical for your business. These typically include:
  - Addressable market (what the opportunity is)
  - The customer (who you're serving)
  - Product (what you offer based on customer needs)
  - Sales motion (methodology, tools, and process)

Ensure you have specific productivity outcomes—both qualitative and quantifiable—that sellers should take away from your onboarding process.

- Sales processes include marketing and sales/business development score leads, and the criteria used to evaluate a qualified opportunity.
- Leverage your market and competition knowledge in your success criteria.

Personalize, personalize, personalize. Don't assume that you should start every seller from square one.

- Leverage insight from your sellers' experience, strengths and weaknesses to create programs around knowledge sharing, coaching and role play and reduce ramp time.
- While introducing a new seller to items such as company mission, product, competition and ideal customer profile is expected, craft programs geared to the specific experiences and skill levels of your seller.

ACTION ITEMS

- [ ] Collaborate with your marketing team to further ensure alignment in terms of demand generation and other outbound marketing activities.
- [ ] Clarify and communicate key sales milestones, established benchmarks, and incentive-driven initiatives.
- [ ] Identify areas where you can shorten ramp time in order to drive faster deal/ quota achievement time. (In-person onboarding programs typically are structured as multi-week classroom style events. shifting to or incorporating more virtual, pre-learning and certification can save up to 50% in costs and in-person time).

3

GUIDING PRINCIPLES

Implement onboarding as a continuing journey, not a one-time event.

Customer-centric selling is all about engagement throughout the seller's and customer's journey.

- Rather than an abrupt transition from the initial onboarding program to insertion into the field, carry over the relevant elements of onboarding into the ongoing sales readiness and enablement programming. An ongoing readiness program should provide a steady diet personalized to the needs, personalities and preferences of each individual.
- Blueprint a readiness program that leverages reinforcement and continues to utilize resources, materials and people involved in onboarding on an ongoing basis. In addition to providing continuity, it also creates a 360-degree, two-way exchange of information that benefits both sides and keeps content current.
- Collaborate with Sales Enablement and Readiness to promote and encourage ongoing knowledge sharing and reinforcement through a single source training and content repository. Best practices and different perspectives are key to growing a seller into a trusted advisor with prospects.
- Correlate revenue streams and quarterly objectives with sales performance and turnover and be willing to evolve your model as business requirements change.

ACTION ITEMS

- [ ] Develop a playbook that complements training and develop guidelines for experienced sellers to capture desired client outcomes at deal closure (within your CRM) to provide real-world experience and examples for newer sellers.

- [ ] Create peer and leader learning circles for sharing and harnessing feedback and be open to serving as a mentor to further capitalize on your seller's energy and enthusiasm to make their number.

- [ ] Gauge hiring and retention patterns and develop an engagement strategy to keep sellers happy and reduce turnover.

- [ ] Engage sellers and use tactics like promoting 2-way feedback and dialogue between managers and sellers, professional and skills development activities (which can include external courses and seminars), and incentives to promote creativity and out-of-the-box thinking (e.g. tangible ideas for approaching a targeted account).

Get in touch with MindTickle to find out how you can arm your salespeople to deliver a superior customer experience.

Get a MindTickle Readiness Value Assessment

Speak with one of our Sales Readiness Experts

Schedule a demo of the solution

MindTickle!

MindTickle provides a comprehensive, data-driven solution for sales readiness and enablement that fuels revenue growth and brand affinity. Its purpose-built applications, proven methodologies, and best practices are designed to drive effective sales onboarding and ongoing readiness. With MindTickle, company leaders and sellers can continually assess, diagnose and develop the knowledge, skills, and behaviors required to effectively engage customers and drive growth.

Companies across a wide range of industries use MindTickle's innovative capabilities for on-demand, online training, bite-sized mobile updates, gamification-based learning, coaching and role-play to ensure world-class sales performance.

MindTickle is a global, privately-held company headquartered in San Francisco, CA.

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