MindTickle

Reboard, Reskill, Reinforce

Checklist for Effective Reboarding to Drive Success for Your Remote Teams

To be successful, sales reps need a deep knowledge of the segments and geographies they are aligned to, customers and personas they engage with and the core products or services they're selling. Equally important is demonstrable knowledge of processes, and behaviors that will help them succeed in sales. Reaching this point begins with managing the hand-off from recruiting and human resources teams and the knowledge and skill transition for bringing newly hired sales reps up to speed. We call this "onboarding."

The Case for Reboarding Customer-Facing Teams to Address and Thrive in the New Environment

Managing productive sellers working out of home or remote offices is not a new thing. What has now changed is that the element of in-person engagement so important to productive sales activity has shifted entirely online. With just about everyone working from various remote locations, field reps are essentially shifting their role to be inside sales reps. This shift demands a new strategy—a kind of onboarding that we call "reboarding"—which, in addition to deepening knowledge and instilling company values, places more focus on developing skills and engaging reps to be productive in this new way of work, and doing it almost completely in virtual space. A successful reboarding strategy is composed of eight elements, some underpinned by functionalities enabled by a Sales Readiness platform.

Prep Work

Address each rep's needs to be successful in an 'inside sales' enviroment. Assess the probability of your existing and new customers continuing to operate in a remote or at best hybrid setting for months or quarters to come. Establish an ideal customer-facing profile defining the behavior for needed pre-sales, sales and post-sales role personnel and the corresponding competencies based on your expected customer buying pattern. Then, determine what skills must be developed or what applied learning must take place that will feed into the re-training that needs to be delivered. This foundation will determine the outcome of a re-boarding approach to reskillling your team because you are effectively resetting or establishing critical new capabilities. A critical element is recognizing that reboarding must offer all or most of the intimacy and interactivity that in-person onboarding offers without the advantage of a shared space with your fellow hires or more experienced peers and colleagues.

ACTION ITEMS:

- [ ] Align the activities and content built into your current onboarding plan with your identified top behaviors and underlying competencies model or capabilities framework. Using analytics from your enablement and readiness platform such as MindTickle, identify the knowledge or skills gaps across teams, geographies or roles—the more you can understand where the knowledge baseline is, the better. By understanding which group(s) need remediation, you can customize and assign specific resources to drive the right behavior. Don't forget to leverage your team's experience to identify resources and assets, some of which may even be your current sales and customer-facing teams.

- [ ] Given the changes in the business environment, now is a good time to re-evaluate and update your current and long-term revenue strategy across your direct and indirect channels (including an often neglected aspect of the extended teams such as the SDR/tele-marketing, field marketing and related sales support functions) and focus on the knowledge areas that are mission critical for your remote teams. These include the addressable market (what the opportunity is), the customer (who you're serving), and product (what you offer based on customer needs). With your teams now working remotely, ensuring everyone is aligned on the (adjusted) sales process (methodology, tools, and process) is essential. While they may be familiar with historic processes working in person, experienced team members will also find value in the good practices required for effective remote selling.

Reboarding

Approach reboarding as an ongoing journey, not a one-time event. Reboarding has two priorities: The introduction of new team members and the refamiliarization of your existing team to the company culture. This begins by providing them what they need to get started in the virtual environment and introducing themselves to everyone.

ACTION ITEMS:

- [ ] Start with the end in mind and identify the outcomes you want from your onboarding efforts.
- [ ] Structure your reboarding program around the three pillars of Teach (help them learn), Show (modeling excellence/best practices templates), and Practice (master skills before talking to customers—virtual and classroom role plays, reinforcement (driving long-term knowledge retention and behavior change—coaching, ongoing content delivery and Space Learning—Q&A methodology delivered over intervals and repeat).
- [ ] Identify and gain clarity on revised sales milestones, established benchmarks, and incentive-driven initiatives. For example, with changes in the business environment, this would be an ideal time to revisit and revise metrics measuring the business impact of your program.

Virtual Bootcamp

Pivot Your Readiness Programs to Fit the Current Situation. Your reboarding program should provide key messaging tips that resonate with a variety of sales situations and opportunities your teams are now facing. And this messaging should be delivered in a way that works with your reps new way of life. A series of knowledge modules gives reps the context and framework to get started while being consumable on their own time and medium of choosing. Virtual bootcamps using vILT and knowledge modules should be designed to simulate a virtual classroom, with task-based activities or role-plays assigned throughout the week. Assessments certify that reps completed and passed the bootcamp.

ACTION ITEMS:

- [ ] Survey or poll your reps to understand your sellers' challenges in order to engage them in conversations and address their needs and concerns. By actively listening to them, you'll be able to deliver meaningful communications that inspires and excites your workforce to drive consistent participation and long-term engagement.

- ☐ Each seller is experiencing something different in the new environment, depending on their industry, territory, audience, etc. Leverage what you and they know about their strengths and weaknesses, insights gained from performance in other sales readiness programs as well as in deals. This shared understanding will strengthen and lead to programs that leverage knowledge sharing, role-play practice and coaching. By personalizing content and delivery customized to sellers' strengths and weaknesses, you will drive improvement over time, adjust the experience and gain higher performance, and speed up ramp to productivity.
- ☐ Deliver easily consumable information. Allow sales reps to learn in bite-sized segments, with defined learning objectives and onboarding/reboarding materials that are readily available and updated with the latest competitive, corporate and product information. For videos and podcasts from leadership, keep them between 2-3 minutes (5 min. max). If you're working with slideware or documents, summarize content into less than 8 slides or 2 pages.

Produce relevant customer profiles. Develop sample profiles of customers that are an appropriate fit for your products, including personalities, use cases and relevant industries. Once reps can understand the psychology and motivational factors behind each ideal customer profile, they'll be able to better advise and support their prospects and customers.

ACTION ITEMS:

- ☐ Identify shareable best practices. One approach is to tap into your Customer Success and Marketing groups to understand how your customers are adapting in the new business environment and how they are using your solutions. Ask about business and technical challenges and pain points, usage and adoption rates, and ROI in addition to soft benefits like productivity, time savings, etc. Customer insights can provide useful awareness of specific industry verticals and geographies for the prospecting team. Conversely, relay important takeaways from your sales and solutions teams to the Customer Success and Marketing groups so that they can help existing customers.
- ☐ Develop an Industry Talking Points messaging document that incorporates those customer profiles along with key industry information. Include industry attributes and trends, industry risks and challenges, key job roles and decision makers, and customer examples.
- ☐ Consider turning best practices and new messaging into useful market-facing materials (without violating any customer reference permissions) for use by the prospecting team. For prospects, customer success slides and industry benchmarking data provides confidence and credibility that your reps understand their business and pain points.

Offer engaging, varied training formats. With sales training techniques like micro-learning, gamification and e-learning, you can present information in a variety of formats to keep reps engaged and help them retain more information long-term.

ACTION ITEMS:

- ☐ Leverage tools such as gamification, competitions and other creative initiatives to encourage consistent participation and long-term engagement. Leaderboards and a points-based readiness program can instill the competitive spirit in reps.
- ☐ For example, MindTickle's sales readiness platform allows you to create a dynamic series of learning initiatives using various Modules depending on the type of content and enablement program you want to deliver:

- ✓ **Courses:** Enables long-form guided learning through visual themes, sequencing and multiple formats of media, question and poll.
- ✓ **Quick Updates:** Offers bite-sized micro-learning information and quizzing.
- ✓ **Missions:** Provides a virtual environment to practice work scenarios and submit the best ones for review and feedback.
- ✓ **Coaching Sessions:** Helps Managers conduct coaching on an ongoing basis.
- ✓ **Assessments:** Helps assess and certify sellers' knowledge in a timed duration.
- ✓ **ILT:** Helps manage and track live training sessions in a classroom or via webinars.
- ✓ **Checklist:** Contains tasks that need to be completed by users on-the-job or offline.
- ✓ **Quests:** Helps knowledge retention by delivering short quizzes at intelligently spaced intervals.

Centralize the process. Access to paperwork, manuals, onboarding/reboarding materials and messaging can significantly improve the results of your reboarding. Enlist the help of a dashboard-style system that keeps everything in one place. A simple, effective, repeatable system will help reps feel confident when the process begins, and provide a simple way to review important information when needed.

ACTION ITEMS:

- [ ] Map out the reboarding enablement program so reps can follow a structured path to complete assignments. For example, with sales enablement and readiness platforms, you can enable and automate the sequence in which modules are made available to your users. A learner would need to complete a module before the next module in the series is unlocked.
- [ ] Don't reinvent the wheel. Repurpose existing content or publicly-available resources by embedding content from partners, sales training methodologies, YouTube or elsewhere in your sales readiness platform.
- [ ] Develop and implement a straightforward tagging practice to make your content and training easy to find. By correctly tagging content, you'll be able to identify any gaps within your programs to ensure all necessary topics and themes are covered.

Coaching and Reinforcement

Provide continuous support. Learning doesn't stop when a virtual session or bootcamp ends. Provide opportunities and a central location such as a Sales Readiness platform for reps to check in, access coaching feedback and track their own readiness with assessments to continue the learning process. Reinforced activities following reboarding help drive engagement.

ACTION ITEMS:

- [ ] Identify a coaching cadence and hold frontline managers accountable. Allow your managers to sync their calendars to the readiness platform to ensure coaching sessions are on their calendar. Structured coaching templates can hold managers accountable to consistent measures of success and help reps continue to build on their skill sets.
- [ ] Set expiration dates on certifications. In collaboration with your reps, you will be able to easily know when reps need to retake an assessment or complete a role-play practice scenario when their certificate expires.

- [ ] Send out quick updates on your readiness platform or share daily tips and tricks through your communication channels. By continuously “dripping” enablement content to your reps, you establish a culture of learning that reps can benefit from in a timely, self-sufficient mode.

Correlate reboarding with sales results. Track the sales team’s effectiveness and efficiency using historical data to assess rep readiness and identify the specific capabilities that make them successful or that require improvement.

ACTION ITEMS:

- [ ] Enable frontline managers to engage and oversee each rep’s readiness progress with roll-up reports. When managers can monitor, encourage, follow-up, and call-out exemplary employees (and those who aren’t completing their training), they can see firsthand the effects of readiness on sales results, thus establishing buy-in to enablement and readiness programs.
- [ ] If you see a particular competitor or objection coming up more often in deals, create a role-play scenario so reps can practice their messaging and delivery prior to speaking with a live prospect or customer. Using MindTickle, reps can practice and compare their pitch to the designated “Model Pitch” (deemed the best by leadership) using artificial intelligence (AI) to receive feedback before submitting to their manager for review. AI streamlines the review process for reviewers by prioritizing the role-plays that need the most help (when compared to the Model Pitch) and providing automated feedback on keyword and filler word usage, speaking speed and submission length.
- [ ] Just as learning doesn’t end, enabling doesn’t either. Continuously adjust your readiness program based on the results or gaps you’re seeing in the field. Frequently survey your reps to make sure they’re getting the support they need. Keeping a pulse on market, business and organizational changes will enable you to equip your reps for success.

Boarding a ship or train is the start of a new journey whether you’re leaving for the first time or embarking on a trip you’ve taken before. Whether you’re a new hire (onboarding) or a seasoned field rep who must adjust to being effective as an inside sales professional for the foreseeable future (reboarding), readiness is a continuous process that shouldn’t have to be interrupted by a change in environment. By having in place a regimented and engaging e-learning process tracked and delivered through a Sales Readiness platform, every customer-facing employee can have access to the tools needed to continue to build sales skills—regardless of where their “office” is located.

About Us

MindTickle offers the industry’s most comprehensive sales readiness solution for closing the knowledge and skill gaps found in customer-facing teams. Organizations across a wide range of industries use MindTickle’s award-winning platform to train, coach, and align their teams to make end-users and their managers more effective.