



THE ULTIMATE GUIDE TO SALES ONBOARDING

Your bumper book of practical tips and tactics for
successful sales employee onboarding and training

The faster you onboard new hires, the higher your revenue.

Fast-growing companies are in a near-permanent state of onboarding with new hires coming in all the time. Other companies may need to replace salespeople due to natural turnover. And companies that sell to the enterprise are always adding new markets, geographies, demographics, products, etc. all of which provoke a need to teach sales people new material, or even to expand the salesforce.

So it's no surprise that everyone is looking to speed up onboarding. After all, the faster you onboard new hires, the higher your revenue, because sellers are already starting to drive sales. Even small changes in the time to first call, first meeting, and first deal can translate into significant jumps in revenue.

Faster onboarding also boosts the amount a new hire brings in each month, particularly in transactional companies with shorter sales cycles (enterprises with more strategic sales have longer sales cycles, so you won't see the results for several months).

For example, imagine you hire 250 new members of the sales team. And in your company, new salespeople might generate \$0 in revenue in their first month, \$5,000 in their second month, and then \$10,000 from their 3rd month onwards.

If you improve their onboarding experience, they might still bring in zero revenue in their first month, but their 2nd month could see \$6,000 and the third could bring \$12,000, which translates into a gain of \$3,000 per rep. Multiplied by 250 reps = \$750,000!

| | Revenue in month 1 | Revenue in month 2 | Revenue in month 3 |
|--------------------|--------------------|--------------------|--------------------|
| Regular onboarding | \$0 | \$5k | \$10k |
| Faster onboarding | \$0 | \$6k | \$12k |

Onboarding becomes everboarding

Of course, we all know that onboarding never dies, it just transitions into everboarding. Even experienced sales representatives need a form of onboarding on a regular basis, whenever you add new features, change the messaging or value proposition, add a new persona or target role, etc. Admittedly, the process will be faster than new hire onboarding, but the approach remains the same.

With onboarding playing such a key role in ongoing sales success, it's vital to get it right. Here's all you need to know about building an effective and fast onboarding program.

Key questions to ask yourself while building your onboarding process
(make sure you can answer "yes" to all of them):

- Is it scalable?
- Is it measurable?
- Is it repeatable?
- Is it aligned with business outcomes?



**Tips for sales
onboarding success**

Tips for sales onboarding success

1. SALES REPS NEED TO OWN THEIR OWN TRAINING

There's a limit to how much you can push sales employees to complete their training if they don't see the value in it. You can encourage them, but at the end of the day, they need to drive their training, and if they understand that they will reach or even exceed their numbers faster, this is often a great incentive.

Make each step in the onboarding process the new salesperson's responsibility, even if it means scheduling appointments with people they haven't met yet. Building up this type of practice culture throughout the entire organization will serve them well once onboarding is complete, and they need to transition to owning their own everboarding.

“ Salespeople that own their own onboarding will own their own everboarding and build up a practice culture in the company. ”

2. CONTENT IS PRIORITY FOR THE FIRST 2 WEEKS

Active onboarding keeps getting shorter, dropping from the traditional 30-60 days down to an average of 14 days, so you need to prioritize the topics you most need to cover.

Before your new hires hit the floor in 2 weeks' time, you'll need to make sure they know:

- ✓ Your organization's buyer target persona
- ✓ Your corporate messaging
- ✓ A reasonable amount about the product

All the rest is commentary.

3. ONBOARDING ISN'T “ONE AND DONE”

There's no way you can escape the sad reality of the forgetting curve, but you can help your new hires overcome it by building in plenty of reinforcement, reiterating the same material in different ways numerous times during onboarding.

Begin by introducing the topic on a high level, taking a broad but shallow approach, and then go back over it many times, digging deeper into the details on every pass. Onboarding also includes establishing a good handoff process and coaching calibration for the next several weeks and months, to ensure that reinforcement continues beyond the first active onboarding period.

4. SCORING NEEDS TO BE STANDARDIZED

Peer to peer sales role plays are the traditional onboarding activity of choice, but they don't result in a consistent and coherent picture of new hire capabilities that allows you - or new sellers themselves - to track their progress.

For example, if a seller gets feedback from an average performer, they might think they're doing a great job, whereas feedback from a top performer might include more (constructive) criticism.

// Second Nature can help with standardized, AI-driven scoring that you can trust to present a reliable assessment of sellers' achievements. //

5. ALIGNED KPIS ARE CRUCIAL

Setting KPIs is a given, but the most important part is aligning them to business outcomes. The challenge of connecting an individual KPI with a business outcome is that it can seem like you have to get across the Grand Canyon to reach the goal, so while monthly KPIs are great, you need longer-term milestones too.

For example, maybe your goal is to schedule 15 meetings by month 2. You'll need to break that down into weekly milestones that will show if you're on track to reach your larger goal. If you miss those, you'll know you need to tweak something in order to hit the end KPI.





**The KPIs you need
for onboarding glory**

The KPIs you need for onboarding glory

The first step is to choose which KPIs you'll use. There are a couple of different basic approaches: you could establish a different KPI for each month, based on the assumption that each month, your new sales employee is moving through the funnel and learning the next set of skills for the next stage in the funnel. For example, the KPI for month 1 might be setting meetings, for month 2 - opening opportunities, month 3 - closing deals, etc.

Alternatively, you could track the same KPIs from one month to the next in the expectation that reps will improve or increase them continually until they eventually reach a plateau. For example, in month 1 they need to set up 10 meetings; in month 2, 20 meetings; in month 3, 30 meetings; and then continue securing approximately 30 meetings per month.

Once you choose your KPIs, you'll need to define goals for each one, which means deciding on which results you want to see for each of those KPIs. Of course, different organizations will set different KPIs and target goals, but here are some suggestions to help you decide.

1. NUMBER OF FIRST CUSTOMER MEETINGS/MONTH

This KPI tracks how many initial sales meetings the salesperson sources each month, helping show how confident reps are about their ability to take a meeting. Your goal could be 10 meetings in month 1 for a transactional organization, or 5 meetings in month 1 for a company that does more enterprise sales.



Track it by:

Tracking the number of meetings booked each month by each seller.

Improve it by:

Encouraging new hires to practice sales conversations on an ongoing basis. Second Nature is a great tool for this!

2. NUMBER OF OPEN OPPORTUNITIES PER PRODUCT, PER MONTH

Pipeline creation is an important leading indicator, so this KPI monitors how many opportunities the sales representative opens per product each month. It shows how well salespeople are succeeding at understanding and responding to customer pain points. Your goal could be 2-5 open opportunities in month 2.

Track it by:

Keeping an eye on your sales force automation platform. Ideally, opportunities should be reviewed by a manager.

Improve it by:

Giving sales hires the opportunity to actively role-play a discovery call, so as to tie together the information they receive about the product with the skills they are taught about each stage of the sales process. Second Nature enables sellers to practice discovery with an AI persona, who answers questions differently each time.

3. \$ OPEN/WEIGHTED PIPE PER PRODUCT, PER MONTH

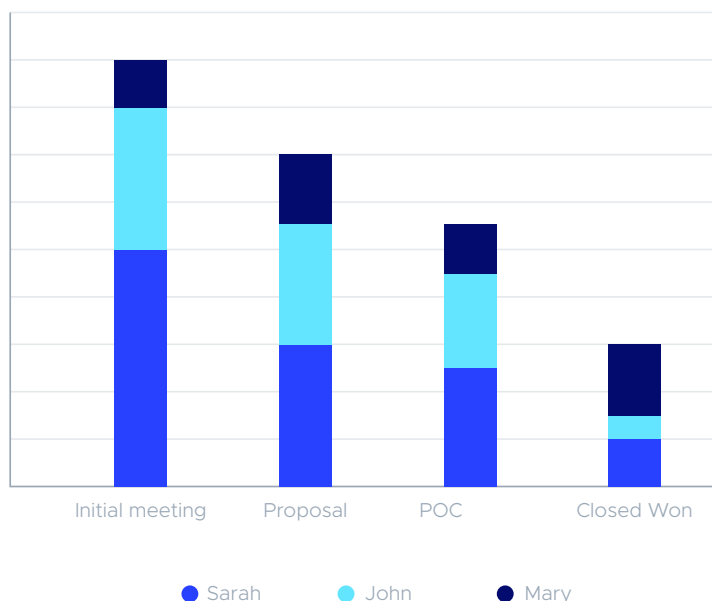
Weighted pipe is a significant leading indicator that closely mirrors pipe win. It adjusts the value of the deal according to which stage it reaches in the pipeline. The KPI is the dollar value of weighted pipe deals that the seller sets up each month, and your goal could be \$200-500k of open pipe in month 3.

Track it by:

Using your salesforce automation platform to calculate weighted pipe for each salesperson.

Improve it by:

Ensure each rep has adequate introductory calls, and if they are not converting to pipeline opportunities, their manager should meet with them to uncover any obstacles or areas where they require additional training.



4. \$ CLOSED WON PER PRODUCT, PER MONTH

This KPI monitors the dollar value of deals that each sales representative secured each month, according to deals marked “closed won” in Salesforce or other sales automation platform. Your goal could be securing \$100k worth of closed won deals in month 4.

Track it by:

Following “closed won” deals per sales rep in your salesforce automation solution.

Improve it by:

Continuing to train new hires beyond the technical end of their 30-day onboarding program. Set a specific cadence of consistent, continuous coaching to help them overcome objections and close deals.



5. TIME TO FIRST MEETING SOURCED

For BDRs, the time it takes for them to source their first meeting is a critical KPI. Your goal might be 2 weeks.

Track it by:

Checking their progress on your salesforce automation platform and comparing their time to first meeting with records for your current sales superstars.

Improve it by:

Integrating practice with training, so new hires can crossover the skills they learn into their daily sales conversations. Implementing Second Nature AI simulations provides a great way for BDRs and other salespeople to practice any type of conversation, so when the seller actually gets someone on the phone, they can have hundreds of practice sessions behind them and will ace the one in front of them.

6. PROFICIENCY MEASUREMENT

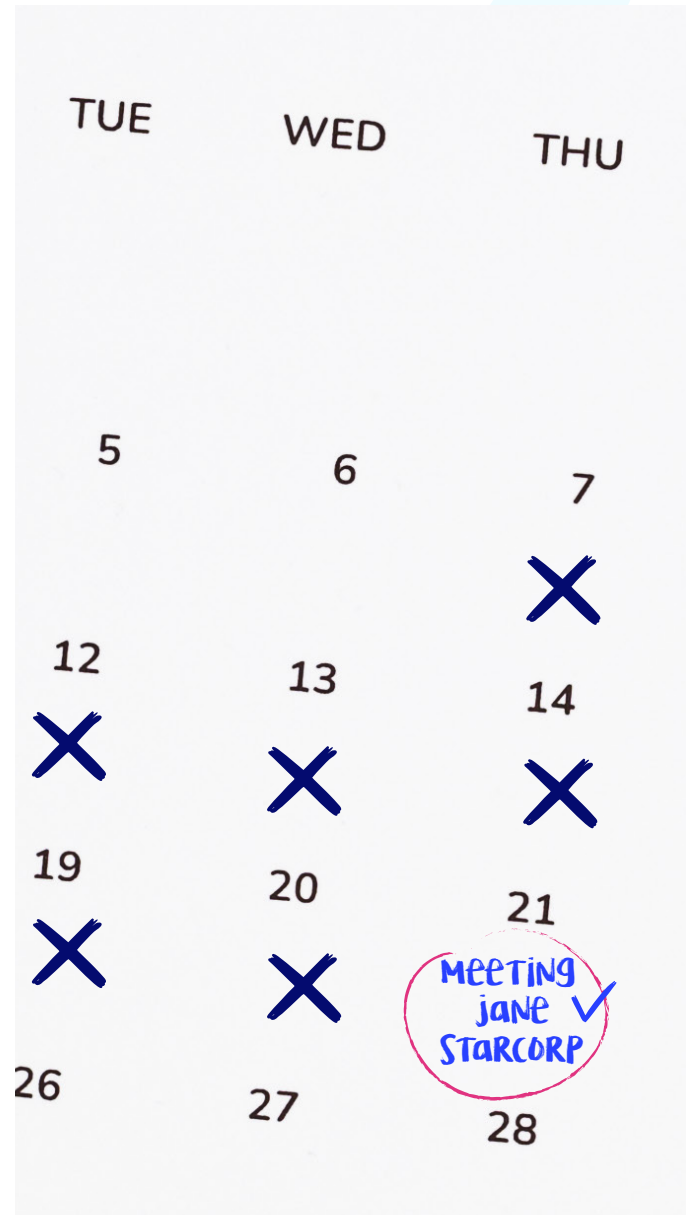
This is a softer KPI than the previous ones, but it can still be valuable. It's a way of tracking how each sales employee performs when carrying out a cold call, demo, case study, or other sales interaction.

Track it by:

Your certification process. Some organizations run a written quiz, others have sales employees record a practice pitch, cold call etc. and have the manager assess it. Still others have ditched these old-fashioned methods and have their salespeople practice with Second Nature and once they have achieved a certain score on a certain practice simulation, they are considered certified. Track the scores that new hires achieve, and compare them with those for existing superstar sellers. Align their scores, and look for average, above-average, and below-average benchmarks.

Improve it by:

Giving sales employees an opportunity to practice their pitches in role play scenarios or with Second Nature's AI simulations.



7. REP SATISFACTION

Satisfaction is another soft KPI that can still reveal a lot about your onboarding success. This one tracks how satisfied new hires are with their onboarding process, support, training, feedback, etc.

Track it by:

Giving respect to the results you receive and following up any criticism or complaints. Ask what you can do to improve.

Improve it by:

Giving sales hires the opportunity to actively role-play a discovery call, so as to tie together the information they receive about the product with the skills they are taught about each stage of the sales process. Second Nature enables sellers to practice discovery with an AI persona, who answers questions differently each time.

How satisfied are you with your onboarding process so far?



8. HIRING MANAGER SATISFACTION

This soft KPI measures how your hiring managers feel about the ability, retention, and skills of each new hire. It's valuable because experienced hiring managers can have a sense of which new hires will succeed and which will fail.

Track it by:

Asking hiring managers for their feedback about each new salesperson's proficiency and confidence, running the survey once just after hiring is completed, and again at the end of onboarding, so you can measure changes in opinion.

Improve it by:

Taking into consideration your managers' feedback and implementing it.

What to do with your onboarding KPIs

Once you've established your KPIs, you need to record the results, track how they change, and store them so you can come back to them on a regular basis.

As new hires go through your program and you see KPI metrics change (or not), adjust the KPIs so they're aligned to the impact of the program. Ideally, you'll see ramp time decrease by your targeted percent, and time to reach a certain level for each KPI should drop too.

Transactional sales teams usually see changes to qualitative KPIs (i.e. the first 5 mentioned above) within 3 months, which will prove or disprove the effectiveness of your onboarding process, but strategic sales teams take much longer. In those cases, you'll need to rely more on the softer quantitative KPIs (i.e. the last 3), because it takes longer for each hard KPI to come on board.



How to structure your onboarding program

How to structure your onboarding program

Although active new hire training may be short, you should still consider that onboarding lasts for 90 days. Make sure that each leader who is part of the onboarding team knows what is expected of them when the new salesperson comes to them for their session.

Download our detailed template to help you get started!

Here's a skeleton outline to help you get started:

0-30 days

Weeks 1-2:

The main focus is on learning about the organization, its tools, and its culture

- The organization, its values and messaging, and its culture
- Sales tools the company uses. Even if the salesperson has used Salesforce or other sales management tools before, they'll still need to learn your company's customizations and the business processes that must be learned and followed, especially since it enables you to accurately track results
- Buyer persona
- Introduction to the product

Weeks 3-4:

The main focus is on learning the actual job

- For Account Executives, this means learning how to present the product.
- The new hire should meet with the Sales Development Rep they'll be working with

Certification at the 30-day mark.

This can be condensed into 2-3 weeks for companies with fairly straightforward product offerings or transactional sales. Certification can be a test, a one-on-one role play with a manager, or achieving a certain score (say 85%) on an AI simulation with Second Nature.

30-60 days

During this time, you'll refine what was learned and focus on reinforcement and coaching. At this point, your new hires can begin to prospect for leads, run demos together with sales manager, and hold discovery calls alone.

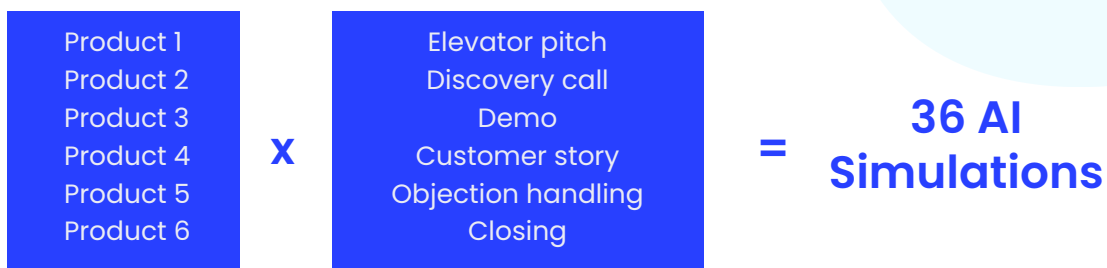
60-90 days

Now is the time for lots and lots of practice, with recertification at the 90-day mark

Download our onboarding template here

How Second Nature customers run their onboarding

Second Nature customers typically structure their onboarding by focusing on the key conversations salespeople need to master in order to achieve sales readiness. For example, if the company has 6 products, and there are 6 key conversations, they would create a program of 36 (6x6) simulations that each salesperson needs to complete with a score of 85% or higher as part of their onboarding.



Conclusion

Best practices for a successful onboarding program

1. Schedule an activity following every learning session. This helps new hires actualize the skills they learned in theory and speeds them along the road to mastering them.
2. Require new hires to get their hands dirty early on. They won't be ready and they might be nervous, but throwing them in the deep end helps them learn faster and builds confidence in the long run. Letting them practice in a safe space like Second Nature helps build their confidence.
3. Create video tutorials for every sales tool and store them in a central location.
4. Take them out of the learning environment and onto your sales tools as soon as possible, to help them become familiar with their functionality.
5. Encourage them to observe and provide feedback on calls and pitches from the beginning. This helps them become familiar with what "good" sounds like and accustoms them to the tone and style that you're looking for.

Sales onboarding can be swift and successful

You don't have to choose between fast onboarding and effective onboarding - with the right strategy, you can hit both jackpots in one. Setting the right KPIs, structuring your onboarding programs wisely, building a coaching culture, and most of all, remembering that onboarding never ends will help you to build successful sales teams of engaged and confident sales employees.

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LEARN HOW SECOND NATURE CAN HELP YOU EFFECTIVELY SPEED UP YOUR ONBOARDING



About Second Nature

Second Nature helps people have better conversations. The company is the first to offer a platform for immersive sales simulations in natural language. By practicing with "Jenny," an AI-powered conversation partner, sales professionals improve their performance and confidence by gaining real time, personalized feedback. Managers and executives use Second Nature to effectively roll out their strategy and influence their teams' conversations in the field, at scale.