

Onboarding:

From start to finish (and beyond)

THE SEC ONBOARDING PLAYBOOK

CREATED BY:

SEC Sales Enablement
Collective

IN PARTNERSHIP WITH:

 **SecondNature**

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Just start. Nothing's perfect. If you don't
just start, you won't get anywhere.

– Stacey Justice, Vice President, Revenue Enablement & Productivity at HashiCorp,
speaking about onboarding at our Sales Enablement Summit in San Francisco 2019

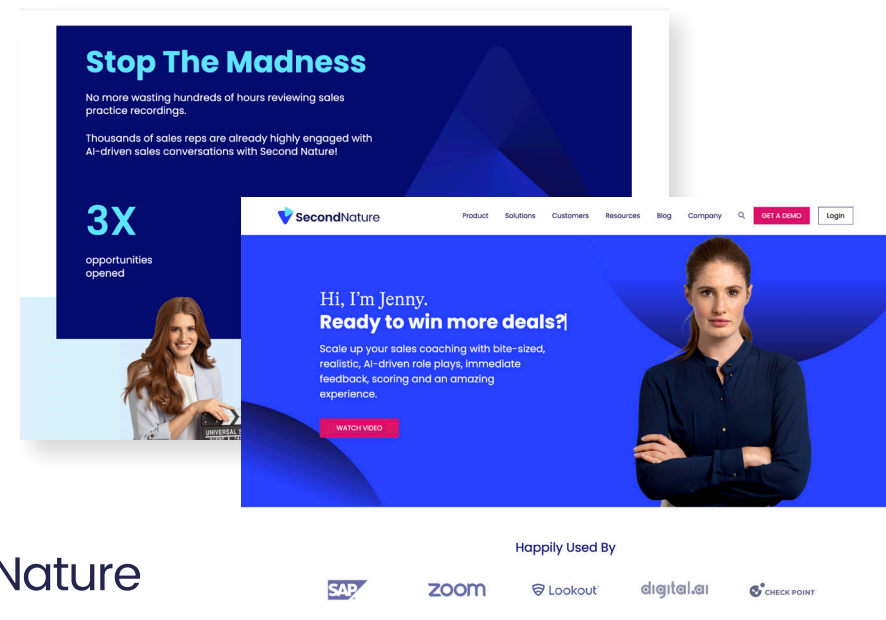
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About Second Nature

This playbook is brought to you in collaboration with Second Nature.

Second Nature enables sales teams to practice and develop their skills and product knowledge before they are face-to-face with potential customers.

By practicing with “Jenny,” an AI-powered conversation partner, sales professionals improve their performance and confidence, and gain real time personalized feedback and analysis, so they can ace every call.



Part 1

INTRODUCTION

Introduction

What is the SEC onboarding playbook?

This playbook is designed as a guide to help enablement professionals build, implement, and maintain their onboarding programs to the highest possible standard.

Onboarding is one of the most pivotal parts of enablement – it forms the foundation for so much of the function’s ongoing work. As a result, enablement professionals are always looking to make sure their programs are up to scratch.

Whether that’s by innovating and taking risks, or learning from others who have tread the same path, there’s always something to improve.

SEC has collaborated with enablement experts and onboarding specialists to put this playbook together, meaning that the contents are tried-and-tested by some of the best enablement professionals in the business.

The onboarding process is where a new hire learns about their new organization, their new role, and their new colleagues. It’s critical to get it right, because you want a new hire to start as they mean to go on: successfully.

What is onboarding?

Onboarding is the process of providing newly-hired reps with the knowledge and skills necessary to perform in their role. The ultimate goal is to prepare reps so that they are able to play their part in leading the company to success as soon as possible.



“Onboarding is always going to be evolving, and our new hires are our customers. We want them to have the best experience possible, and we’re setting them up for their entire career.”

Marco Galvan, Sales Onboarding, Events, and Communications Manager
at Atlassian

Part 2

**DESIGNING YOUR
ONBOARDING
PROGRAM**

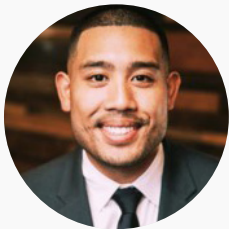
First steps

Vision statement

Before going full steam ahead and creating a load of content, spreadsheets, and slide decks, there's a few first steps you have to take. These ensure that your onboarding program will be effective in achieving its aims.

Before anything else, step back and think about establishing a vision statement. This concise statement will guide your onboarding program moving forward. Whenever you're faced with a decision, you should run it against this vision statement.

Don't rush this phase - if you can't summarize what you want to achieve, you won't be able to bring structure to your program.



"Your vision statement should be a short, targeted statement that says **what you're going to accomplish**.

"That statement helps you guide all of our decisions moving forward."

Garrett Rafols, Senior Director,
Center of Excellence at Gympass

Expert example:

To create meaningful and memorable new hire experiences and ensure our employees are informed, engaged and inspired by the work we do.

- **Garrett Rafols, Senior Director**,
Center of Excellence at Gympass

Understand the journey

Once you've established your vision for your onboarding program, your next consideration needs to be the new hire's role, expectations, and journey.

This can take many forms - speaking to sales managers in order to understand the skills that an incoming rep will need to be trained in to meet the standards of the team, for example. Maybe it will involve meeting with the HR team responsible for the job listing.

The more input you have from the wider organization, the better you can prepare new hires for life as employees.

If you're building an onboarding program for sales development representatives (SDRs), don't be afraid to shadow existing SDRs. This allows you to understand not just the skills and competencies you need to train reps in, but also the mentality that you need to instill during your onboarding.

Shadowing will also teach you about the nuances of the role, such as the unique language and terminology, or niche differences in each region or segment.

Another critical aspect of this process is that it gives you the chance to set benchmarks for your new program.

If you've spoken to sales leaders and learned that brand new SDRs are expected to call customers by their third week in the company, you'll know that "elevator pitch" training will have to be a week one priority.

Understanding the journey requires both qualitative and quantitative perspectives - you need to understand what the new hire's aims and objectives will be, but also what those goals mean numerically.

It's not just the broad understanding that a new SDR needs to be on the phone by week three, but grasping the numerical objective behind that that they're expected to generate four opportunities in their first six weeks is important too.

In short - understand what's expected of the new hire, both in the short- and long-term, and start thinking about how your program prepares them for those expectations.



"I always start by understanding what their journey looks like. At Okta, our SDRs and BDRs have targets in their first month. So we have to build to what those targets look like.

"Then I go into competencies. If you don't understand what you want people to be able to do by the time they get to the end of the program, there's no way to measure, build programs, and upskill."

Molly Sestak, Sales Enablement Program Manager EMEA at Okta

Know your audience

Enablement is an evolving field. What was once sales training became sales enablement, and now sales enablement has shot off in different directions, with revenue enablement, GTM enablement, product enablement, and others becoming increasingly more common in job titles alongside sales enablement.

That means there's another important question to add to the mix - who's your audience?



"If you're a revenue enablement team, and you work with all different types of roles within your organization, who are you creating this onboarding program for?"

"If it's for everyone, chances are that program is going to be pretty general. Then are you going to have supplementary programs that just focus on onboarding for certain roles?"

"Because what an Account Manager needs is going to be different to what an SDR needs."

"It could be difficult, depending on your business, to combine everything into one program. So ask yourself: who's the audience, and do I need to create separate programming?"

Carly Lehner, Senior Director, RevOps & Enablement at Andela

At this point you should find yourself with answers to the basic, must-know onboarding questions:

- What's my vision statement?
- Who's the audience? AEs, SDRs, BDRs, Account Managers?
- What's expected of new hires in regards to skills and competencies? What skills and competencies must the new hire have by X months?
- What targets (performance metrics and expectations) does my program have to be built around?

With these, you can start to consider what the program will look like. Will it be an intensive, two-week program that allows reps to start making calls early into their career? Or does a slower, more calculated two-month program fit the needs of your organization better?

These questions are difficult to answer without the information you gather as you work to establish a vision and understand the new hire's role and journey.

With that information, however, the pieces start falling into place and you can begin to picture your onboarding program coming together.

Don't forget - how are you going to deliver the training?

Are you going to fly everyone in for an in-person bootcamp experience, old-school style? Or are you going to target a virtual delivery?

Again, this is dependent on the needs of your organization. We'll go into some more depth on this later, but the picture starts becoming clearer when you start asking yourself the right questions and finding those answers.

Designing the program

Involving the right people

As a sales enablement professional, half the battle (if not more) is knowing how to leverage the resources available to you while you design your programs.

You don't have to hand-deliver every single module. Instead, you need to be the strategic mind who can map out the new hire's onboarding journey and make sure they're making contact with, and learning from the right people in the company on that journey.



"It is impossible to know everything, but leveraging subject matter experts (SMEs) and taking direction from leadership on what they're seeing in the field ensures you focus on what is needed."

"In order to get the perspective of what enablement is needed, you need to work closely with sales managers to identify those needs, as well as work with departments like Product Marketing to provide expertise on solving those needs."

"In some ways, when you're working independently, you act more like an air traffic control, directing the right people to the right place at the right time."

Michael Gugliotti, Global Head of Sales Enablement at Forter

To achieve this, here are some suggestions on people you should involve, but remember that as with everything when you're designing your program, it may vary.

A Sales leader

- Sales leaders are important in countless ways. When it comes to onboarding sales reps however, there are a few key reasons to get them involved.
- They set the culture for the entire sales organization. They'll be there to ensure that the culture of the company is feeding through to the new hires you're onboarding.
- Sales leaders are able to provide top-down perspectives and explain the organization's vision in a unique way.
- They provide aspirational leadership. New hires are presented with a vision of success, and can see firsthand the levels of accomplishment possible within the company.

A frontline manager

- Frontline managers are a great resource because they're the people who will ultimately oversee and interact with the new hires on a regular basis. Making sure their face is recognized and familiar is a great way to make a new hire's transition into their role easier.
- Because the new hires will be interacting with the frontline managers regularly, it makes those same managers the ideal people to help guide the direction of the program. They know what good looks like more than almost anyone in the organization and that makes them valuable to you as you design your onboarding.

- You can also use frontline managers as your extended enablement arm. Everyone learns differently and will have different strengths and weaknesses, so they can help coach reps further outside of the classroom. This coaching can help to identify red flags early, so you can solve the issue quickly and get new joiners back on track.

A top-performing rep

- Why involve an A+ rep into your onboarding process? Simple - you want your new hires to replicate the top reps' performance. These reps can share that all-important tribal knowledge that can make all the difference to a new hire's ability off the bat.
- Not only can you use a top-performing rep to showcase the level you want new hires to achieve, but you can also get interesting perspectives on your program from current reps. What parts of your onboarding program helped the rep reach that high level of performance? Which hindered their progress?
- You might consider speaking to a B-level rep as well. If they're on the cusp of being a top rep, what are they missing? And how can you make sure that incoming reps do get that missing piece?

A recently onboarded rep

- Later on in this playbook, we'll look at how to use rep feedback to continuously improve your program in more detail. However, this part is important and merits inclusion here as well.
- Speak to a recently onboarded rep, and ask what parts of your onboarding program helped them the most?
- Don't just accept the praise though! Make sure to find out what else should have been included content-wise, and what was of little value during their initial onboarding?
- Recently onboarded reps are a great resource because they're both experienced enough in their role to know what works and what doesn't (to at least some extent), while still being new enough to remember their onboarding clearly.

Top tip



"One of the best things we do during boot camp, which I really haven't seen other companies do, is try as hard as possible to have one of our many customers present.

"Talking about the customer experience is one thing, but to actually have a customer present and talk about their journey from the cold call all the way to close won.

"And from their perspective, the first day they started getting value from working with us and why they continue to choose working with us - that's big"

Thomas Cheriyan, Senior Director of Learning & Development at OwnBackup

Structuring your program

So, when you get down to the details - what will the program actually look like?

Do you need to have everything delivered in-person and live, or can you mix in some self-paced elearning and run a hybrid program? Maybe you want virtual, instructor-led modules included.

These are the considerations you need to make, and the conversations you have with stakeholders, along with your vision statement, will help to guide you.

As different organizations have vastly different needs, this playbook can't tell you exactly what route is best for you. However, we can lay out the different approaches you can take and the advantages and disadvantages of each.

You might find that one part of your onboarding process will work better in a certain format, while another part may be more effective when done in a different manner.

| In-person advantages | In-person disadvantages |
|---|--|
| In-person onboarding is...well, personal! Getting new hires together in an environment where they can learn face-to-face is a great bonding experience, as it allows company culture to shine through effortlessly. | If you're not hiring exclusively from the local area, it can be expensive to bring everyone into your HQ for a period of time - especially if you're a smaller organization. |
| In-person learning provides new hires with natural opportunities to practice and reflect with their fellow newbies. | Bringing everyone in together may result in more introverted new hires feeling uncomfortable, and perhaps not getting the most out of their time at the training. |

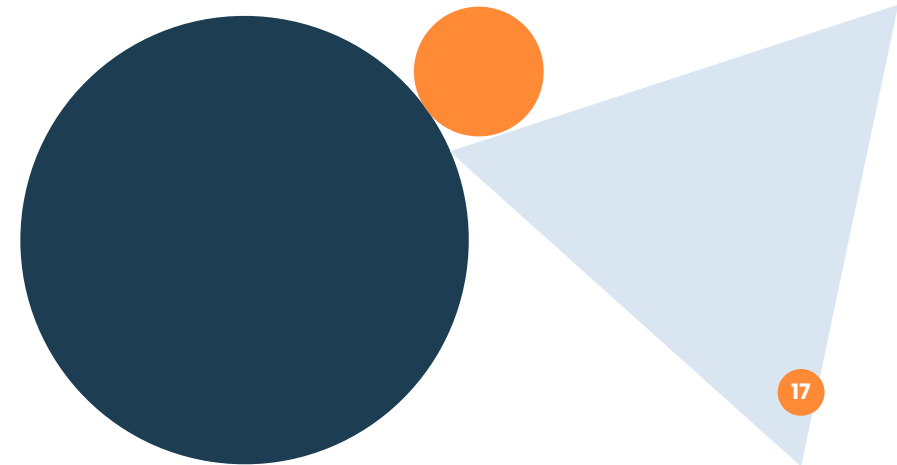
| Virtual, self-paced advantages | Virtual, self-paced disadvantages |
|--|---|
| <p>Pre-recorded, self-paced e-learning content allows new hires who learn at different speeds the opportunity to work through the material in a way that suits them.</p> | <p>Learning asynchronously can be isolating. With little interaction and heaps of onboarding content to get through, if not managed right it can be overwhelming for a new hire.</p> |
| <p>Similarly, the content can be consumed in any environment - so the new hire can learn where they're most comfortable, increasing knowledge retention.</p> | <p>When operating a virtual onboarding program, it can be harder to instill the company culture. Without doing some extra work, virtual training can result in a lack of growth in the culture.</p> |

| Virtual, instructor-led advantages | Virtual, instructor-led disadvantages |
|---|---|
| <p>Virtual means no boundaries - you can bring in instructors from across borders cost-free. That means your new hires can be taught by people from all over the world, and you don't have to worry about not being able to take advantage of an SME's expertise because of their location.</p> | <p>One potential issue requires no introduction: so-called "Zoom fatigue".</p> <p>If you pack your onboarding full of virtual, instructor-led Zoom meetings you risk burning out your new hires.</p> <p>They'll lose focus and retain less information due to being distracted.</p> |
| <p>With virtual, instructor-led training you have the option of recording the sessions. This allows those who attended to review and reflect on the session, and it means you can reuse these lectures with future cohorts.</p> | <p>While the ability to bring in anyone in the world is good, you're also at the whim of their technology.</p> <p>Always bear in mind the potential for tech faults and have contingency plans in place, otherwise your whole schedule risks being ruined.</p> |

| Hybrid advantages | Hybrid disadvantages |
|---|--|
| <p>Hybrid programs, where you can cater to both in-person and virtual new hires simultaneously, allow you to capture the best of both worlds.</p> <p>Those who do their best work virtually can, while those who learn better in an in-person setting are also getting their preferred experience.</p> | <p>Creating a hybrid program is twice as much work, as you're essentially working on both an in-person program, and a virtual program.</p> <p>It can be tiring and time-consuming to get nailed down.</p> |
| <p>Can help foster a strong company culture across borders. Whether new hires are at HQ, or on the other side of the country (or world!) they're going through the same onboarding, and will feel united.</p> <p>Knowing that a colleague in London and a colleague in San Francisco are all working towards a global, united goal can be motivating and help drive good company culture.</p> | <p>With hybrid onboarding, it can be difficult to ensure that the in-person attendees and virtual attendees are on a level playing field, as they are, ultimately, getting different experiences no matter how hard you try.</p> |

When it comes to structuring your programs and their various modules, the key is to weigh up these advantages and disadvantages and analyze how you'll mitigate the disadvantages.

For example, if you're concerned about "Zoom fatigue" then ensure there are adequate breaks between sessions and that the sessions themselves aren't too long.



What delivery method for what content?

Different types of content will suit different delivery methods, so this needs to be a consideration as well.

Here's some examples:

- If you're dealing with easy, well-defined topics such as a step-by-step, how-to guide, or topical description (such as explaining the stages in the buying cycle), you might use shorter, self-paced recordings.
- For content along the lines of role plays, objection handling, and script development and practice which require back-and-forth or multiple iterations, an in-person or video meeting will likely be a better approach.
- Remember to leverage your LMS's strengths, as many are equipped with capabilities that can help with the development and deployment of various learning methods used.



Flipped classroom model

The flipped classroom model is becoming increasingly popular, and not just in sales enablement. Any field where teaching is required is quickly adopting this method as research has shown it to be very time-efficient.

The actual “classroom” time is incredibly valuable, and in the flipped classroom model it’s not wasted on running through basic concepts, and instead is used to consolidate knowledge.

Here’s a quick, simple, step-by-step guide to the flipped classroom model:



Students are given “pre-work”. This can involve reading material, watching content, listening to podcasts, and more. This is where the student learns about the concepts you’ll teach before they enter the classroom.



The actual “class time” is when everyone is brought together in a classroom (physical or virtual). Here, the teacher or instructor should answer questions, address individual concerns, work on problem-solving, and encourage active practice.



The materials from steps one and two should be recorded and uploaded, so that students can revisit them when they need to.

There are a whole host of advantages to this approach, and it's one you need to seriously consider if you plan on running a modern onboarding program.

1. The first advantage is that you create a database of knowledge, accessible to all. The more you add, the more knowledge is available to current employees, new hires, and future hires. It's a way of ensuring that tribal knowledge is disseminated even in today's virtual world.
2. Secondly, it establishes a baseline level of knowledge for when your new hires enter the classroom. Your onboarding group may contain people who have worked alongside sales in a marketing role, are straight out of university, and have a solid amount of experience in sales as an SDR, for example.

Throwing this group into a lesson is difficult – if it's too basic it'll be boring and uninteresting for the person with experience, while if it's too high-level the person fresh out of university will be out of their depth and confused.

Pre-work allows you to establish a baseline that you can then build from in the lesson itself.

3. Thirdly, it means you and your SME's precious time is being used productively through problem-solving and providing practical solutions rather than reciting basic information to new hires.

When you adopt the flipped classroom model, you're shifting the focus away from lecturing, and towards collaboration and practice.



Carly Lehner, Senior Director, RevOps & Enablement at Andela

"I think the flipped classroom model works incredibly well, especially with sales, because you need to digest the information – but then you want to come and discuss that with your peers and the experts."

Your onboarding checklist so far

There's quite a lot to do when you're building an onboarding program, so here's a checklist of what we've run through so far - it'll help you keep track of your onboarding activities.

| | | |
|-------------------------------------|---|----------|
| <input checked="" type="checkbox"/> | Have you created a vision statement? | Yes / No |
| <input checked="" type="checkbox"/> | Do you know the audience of your program? | Yes / No |
| <input checked="" type="checkbox"/> | Do you know what's expected of new hires in regards to skills and competencies? | Yes / No |
| <input checked="" type="checkbox"/> | Do you know what targets your program should be built around? | Yes / No |
| <input checked="" type="checkbox"/> | Have you spoken to the right stakeholders? | Yes / No |
| <input checked="" type="checkbox"/> | Have you decided on a structure for your program? | Yes / No |

Part 3

**IMPLEMENTING
YOUR PROGRAM**

From ideas and plans to something real

At this point, you'll have done a lot of research and thinking about how you want this onboarding program to look like.

It's now time to turn those ideas, plans, research, and discussions into something real that can start being implemented for upcoming cohorts of new hires.

Your minimum viable product will be your MVP!

We'll talk about this more in **Section 3: feedback, reinforcement, and evolution** but it's so important that we'll mention it here as well.

Your first iteration doesn't have to, and won't be, perfect.

There is so much involved in creating a successful onboarding program that it's practically impossible to roll out a perfect 'V1'.

Instead, aim to implement your 'MVP' at first - that's your Minimum Viable Product.

In short, that means sorting out the essentials, then using feedback from post-launch to iterate on that MVP.

Your essentials when it comes to skills, competencies, and behaviors should already be front-of-mind from earlier, but you'll need to think about things like product knowledge, tool and tech knowledge, sales methodology and more.

For example, let's take product knowledge.

Ideally, you want your reps to have strong product knowledge. This is natural. However, if you're onboarding in a situation where reps will be making calls within a month then you might not be able to fit the full breadth of product training you want into your program, at least initially.

That's where creating an MVP comes in. Start with building a value proposition (the pains solved by the product) module into your program, as that is a must-have. Your onboarding program won't be viable without it. Then, as you iterate, you'll learn where and when to include the rest of the product training you originally wanted to include (or you'll even find out that the value proposition module is effective enough to do the job you need, perhaps).

The moral of the story is that launching a minimum viable product will be your best friend - it allows you to get the program up and running so you can start meeting the needs of new hires and the existing sales organization while kickstarting the iteration process as well.



"When onboarding, we start by developing top of the funnel skills like discovery, product value, and so on.

"That way, our reps can get into the field as quickly as possible.

"Then, we have established regular coaching sessions between managers and reps, not just pipeline reviews.

"Our coaches equip managers with the information needed to deliver this feedback."

Spenser Miller-Fellows, Sales Enablement Leader at Invicti



Building out from your design

Remember those questions you asked yourself in the first phase – who needs to be involved, what skills and competencies you need to train against, what the expectations and targets for new hires are?

This is where you start to address them.

Match skills and competencies to modules or sessions, so that you can ensure that your new hires will be up to scratch when they join the organization. It's one thing to understand what they need to know, and it's another thing to make sure they know it.

It can help to visualize it, here's an example:

| Module / Session | Skill / competency / behavior addressed | How early is this needed? | How will this be delivered/who will deliver it? |
|---------------------------|---|---|--|
| 'Intro to our company!' | Culture buy-in | Day 1 - help them understand the company culture from the get-go | In-person at New York HQ, delivered by our Chief Sales Officer Sarah A. |
| 'Elevator pitch' | Basic product value proposition knowledge | Week 1 - expected to make calls in week 3 | Virtual live session with regional sales manager Joe B. |
| 'Understanding Product X' | Intermediate product knowledge | Week 3 - starting to get comfortable with the value proposition | Pre-recorded session hosted on LMS, with product marketing manager Jane C. |
| ... | ... | ... | ... |

Don't be afraid to get creative with colors and layout! Your spreadsheet tool of choice can be very useful for this sort of activity.

Scheduling

Scheduling can be tough – everyone is busy, and everyone is being pulled in different directions – especially after the initial week or two.

Here's some advice from Lyle Jacon, longtime sales enablement expert:



"For the schedule, expect to be more detailed (we're talking daily, hourly) for the first week or weeks.

"For the first month, quarter or first few quarters, include general knowledge and capability objectives. Set out when these should be achieved by, to allow for the tracking of progress.

"If your content is already available, start with an inventory:

Recorded videos – Identify the number of videos you have, how much time you need to dedicate for each, and the timing for delivery (first day, first week, second week, etc.)

In-person training sessions – If you know that you have several in-person training sessions that'll take 3 – 4 hours each (product value proposition training, discovery training, etc.), identify how many of these you have, and again both the time for each and the delivery timing.

Shadowing – Start by identifying a preferred amount of shadowing, either by time or by event, and consider position "status" too. For an SDR you may want them to be in on 20 call discussions alongside a seasoned, high-performing SDR as well as a solid shorter term SDR. For an AE position, you might want them to be on 2 – 3 each of qualification calls, discovery calls, demos, proposal delivery, negotiation, and so on.

Human Resources onboarding – HR may have a specific orientation that each new employee will need to participate in along with other requirements. Identify the exact schedules and timings so you can plan accordingly."

Lyle Jacon, Sales enablement expert

Common inclusions in onboarding programs

Here's a list of common things you'll need to include in your onboarding program – don't forget that the order you deliver them in depends on several factors, so talk with the relevant stakeholders and prioritize creating a minimum viable product that has room to improve, evolve, and develop.

Basic company information

- This includes things like HR and payroll information, security training, and so on. While HR will largely be responsible for this, keep an ear out for any issues you can help with. HR's onboarding and your onboarding will be a rep's first experience with your organization, so make sure they get a good first impression (some company swag might help with this!).

The role's overview and the expectations

- This should include your learnings from studying the journey of a new hire. What does a fresh face in the sales team need to know about their new job, such as the day-to-day, targets, who they report to, and other topics of that nature.

Sales methodology training

- Whatever sales methodology is in use in your organization, incoming sales reps will need to be either trained in it, or given a refresher course. This doesn't have to happen all in the first week, of course. You may find it useful to divide methodology training over a number of weeks, with 'priority' items being placed earlier into the onboarding program.

Tools and technology training

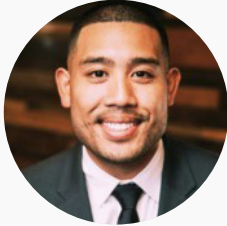
- Your sales teams will undoubtedly be using a tech stack to support their efforts. Tech stacks differ in size across organizations, and some parts of it are more essential than others. When implementing your onboarding program, you need to consider what tools are a priority for training, and which can wait. For example, CRM and lead-related tools will be a higher priority than any proposal- or pricing-related tools your organization uses.

Product knowledge training

- We touched on this earlier, but your new hires will need fairly comprehensive product knowledge, but not right away. Your product's value proposition and a one-pager is essential information which needs to be covered early on in the onboarding process. Meanwhile, deeper knowledge that helps reps who venture deeper into the sales funnel can be acquired a little later on.

Additional training

- The list above isn't comprehensive because every organization will have its own, unique onboarding needs. The key is that you discover these needs by speaking to the right people and asking the right questions. Other training which you may want during onboarding includes industry and competitor training, shadowing of colleagues, and company operations training which explains the general running of the organization and how to work with other departments apart from sales.



“Be as prescriptive as possible, and really make sure that you’re detailing instructions.

“You can’t make any assumptions. The new hires are by and large alone in their rooms, going through your training, entering a new company, and they don’t know what to do.

“You need to be acutely aware of the struggles they could be encountering, and be prescriptive with the directions you’re giving your audience to make sure that they’re going through the programme appropriately.”

Garrett Rafols, Senior Director, Center of Excellence at Gympass

Documentation

The way you document your onboarding program is just as important as anything else. From pre-recorded content and satisfaction survey results to slide decks and spreadsheets – everything should be recorded and accessible by those who need it.

It's not enough to roll out a program in a disorganized fashion, as that will make it far more difficult to iterate on it.

Leverage tools in the tech stack like your content management system (CMS), learning management system (LMS) and sales readiness and enablement platforms. There's a whole host of solutions that help you organize your program.

If you're in a position where you can't invest the budget into comprehensive solutions for your tech stack, don't fret as there are ways to work with this, such as using a Google Drive for content management, and spreadsheet tools to track key figures.

The documentation stage isn't one to overlook or rush. If you don't know how you'll document a program or where the documentation will live before you roll out the program, you're making things difficult for yourself.

Metrics

Speaking of documenting, capturing results, and measuring data – what sort of metrics should you be looking at? These vary drastically depending on the organization and the expectations set upon the audience of your onboarding program, but we’ve listed some of the more common ones to help get you started.

We’ll go into more detail on improving your program and why these metrics are handy in **Section 3**, but it’s important to know what you’re going to measure and document before the program is underway.

“Time to X” metrics

- These are especially useful to measure the success of onboarding programs that have been specifically designed to reduce ramp times. Metrics like Time to First Sales Qualified Lead (SQL), Time to First/Second/Third Sale, and Time to Quota/Productivity are all metrics that are used by sales enablement professionals who design onboarding programs.

Qualitative, rep feedback metrics

- Qualitative data can be a powerful tool to help you evolve your program. Surveys with questions about how valuable each session, and the overall program was can be extremely useful, even more so when you revisit and ask the same questions one, two or three months later. That way, you can truly see the value your reps got from the program once they were out in the field. Additionally, rep confidence metrics are similarly effective.

Skills and competencies certification metrics

- By now, you’ll have outlined and have a full understanding of the skills and competencies you need to instill into new sales hires in order to set them (and the business) up for success. Creating certifications to track how developed these skills and competencies are allows you to examine completion and success rates. That way, you can see which needs your onboarding program is meeting, and which it isn’t.



“A strategy that we’ve found successful is defining a set of competencies for each role.

“We have new hires give themselves a self-assessment of these once prior to onboarding, and one more time after

they’ve finished onboarding.

“Then have their manager assess them about three months after the new hire finishes onboarding, and we use their progress as a way to demonstrate ROI.”

Willa Fogarty, Senior Manager, Training & Enablement at Pandora

Communicate the roll out

It's a tenet of sales enablement in general, so of course it applies to onboarding as well. If you want to roll out a successful onboarding program, you cannot afford to be in a silo.

When you make your plans, don't just note the goal of the session, the target dates, and so on – include everyone who needs to know the information and ensure they get it.

These key stakeholders need to be involved at every step of the process. Your sales enablement team may 'own' onboarding but it's a team effort that affects the entire revenue-generating part of the organization.

Keep everyone who needs to be in the loop updated and you'll be able to manage stakeholder expectations better, while also opening yourself up to proactive feedback based on ever-changing stakeholder needs.

Part 4

FEEDBACK, REINFORCEMENT, AND EVOLUTION

Taking feedback

Importantly, the process of creating an onboarding program doesn't end the moment you roll the program out and incoming sales reps start being onboarded. It's a continuous process, and as a result each cohort you onboard will have a slightly different experience from the last.

The goal is to learn from each cohort you onboard in order to make the onboarding process even more effective for the next.

How do we do this?

Firstly, by setting your program up to be flexible. Don't get into the mindset that your program is infallible just because you put a lot of work into it.

The 'perfect' onboarding program doesn't really exist, as you constantly need to iterate and evolve in order to meet the changing needs of your organization, improve on previous versions, and adapt to shifting market conditions.

Your minimum viable product comes back into play here because if you've done it right, it should be flexible by design.



"How do we get feedback? By checking in with people personally.

"I really enjoy scheduling check-in calls with the new hires after 30/60/90 days to just have a conversation about: 'Hey, how is onboarding going? What questions do you have? What can I clarify for you?'

"Also reaching out to managers and asking: 'Hey, is your SDR ready to hit the phones on their third week like we wanted them to be?'"

Carly Lehner, Senior Director, RevOps & Enablement at Andela

Ultimately, you need to be prepared to take 360 degree feedback.

That means you need to have structures in place that allow you to listen to:

- The reps who are actively participating in the onboarding program.
- Reps who have recently (<6 months) completed the onboarding program.
- Sales managers who are directly responsible for those coming out of the onboarding program.
- Sales operations and leadership who have an overarching vision for the wider sales organization.

What you learn from these conversations will shape the next onboarding cohort's experience, and the feedback from that cohort will allow you to evolve the program further.

This is always a good time to revisit your vision statement from Section 1. The program is out there, in the wild, it's been rolled out - but is it achieving your original aims and is it setting reps up for success?



"Don't just think about the onboarding process. What does post-onboarding look like? What does reinforcement look like?"

"If you're building programs from scratch, think about those things in advance.

"Have feedback mechanisms in place too. What are you doing with your feedback and how is that providing continuous reinforcement for your organization?"

Raquel Ferrari, Revenue Enablement Manager at Spekit

How do you actually gather that valuable feedback? Firstly, by scheduling in regular conversations with those stakeholders so that there's a prompt for that feedback to be provided.

Ask the sales managers - are new hires arriving with the necessary skills or not? This isn't something you can fix before the program is rolled out, or even in time for the first or second cohort and that's why you iterate upon the program for constant improvement.

Secondly, you can look at the metrics we touched upon earlier. Let's look at them in a little bit more depth:

Metrics, explained

“Time to X” metrics

One of the simplest ways to measure your onboarding program’s success is to track these “time to X” metrics.

Whether that’s time to first, second, or even third sale (TTFS, TTSS, TTTS), time to first SQL, or time to quota or productivity, they’re all extremely valuable, “101” onboarding metrics.

Why? Simple.

For example, imagine your sales organization is operating at an average TTFS of 4 months, and then that time falls to 3 months after you’ve rolled out your new and improved onboarding program.

That is tangible evidence of an effective onboarding program. It doesn’t *definitely* mean your program is working better than before, but it’s a pretty good indicator.

Perhaps this was a particularly strong cohort, who would’ve excelled even under the previous program, or maybe this was a lucky cohort that managed to close their first deals a little earlier than expected.

That’s why it’s critically important to track multiple metrics across multiple cohorts so you can learn exactly where you need to improve.

One of the difficulties with creating an onboarding program is proving you’re making a difference, and one of the challenges the enablement function as a whole faces is proving its value to senior management and stakeholders.

If you can track and improve these “time to X” metrics, you’re able to tick both those boxes at once.

Ultimately, if you’re lowering ramp time while increasing productivity and have the numbers to back it up, you’re doing something right.



“When a new hire starts, sometimes they’ll inherit opportunities from their predecessor. While it’s great to get a win, I also want to know when their first truly generated sale from themselves is.

“I’ve seen new hires get a sale within like their first 5 days when typically our sales cycles are 30.

“It’s great to have that right off the bat as it builds learner confidence, but it’s not necessarily a good leading indicator because sometimes we get lucky.

“So I measure a second sale as well and see if it’s following the average deal time.”

Carly Lehner, Senior Director, RevOps & Enablement at Andela

On the flip side, if you're seeing these "time to X" metrics staying the same (or worsening), it's a clear indication that you need to pivot in your approach.

That's why you build your program to be flexible: so that you can iterate on the good, but also adapt when you've made mistakes.

One thing to note is that "time to X" metrics won't necessarily tell you exactly what to change or where you've gone right or wrong, just whether your reps are leaving the program in a position to meet their targets and expectations.

There are other pieces of data you can use to get a closer look at the specifics.



"It's crucial to align your onboarding KPIs with business outcomes. Identify your key KPIs, like scheduling 15 meetings by month 2, or generating 20,000 on the pipeline by month 3.

"Then, the faster you onboard your new hires, the quicker you achieve these KPIs

and generate revenue."

Ariel Hitron, CEO and Co-Founder, Second Nature

Qualitative, rep feedback metrics

Qualitative data can seem easy to collect - just throw out a survey at the end of each module or session, tally up how many people were happy with it, and move on.

In reality, however, that data will only be worth something if you approach the collection strategically and have a plan in place for using the results.

In the context of onboarding, there's two ways you should definitely be using qualitative data from rep feedback:

Method 1: analyzing immediate sentiment

The first method is immediate - after a training session, or module, or completion of your onboarding program, try to gather how the reps felt going through it.

Did they enjoy it? Did it feel useful? Was it relevant?

Using net promoter score (NPS) principles, you'll be able to gather data on the emotional side of your program and how it made your reps feel.

As part of your planning, set targets for this prior to the survey being sent. For example, that you want 80% of new hires to find a session useful, or relevant. The targets can be flexible - the important thing is that you're not making them up as you go.

Plan first, then ask your questions and know what you want to do with that data.

Only 60% of new hires are finding your product training interesting? Speak to them and see how you can make it more exciting.

75% of your reps think that session is too long? You need to shorten it.

These immediate sentiment insights can be a great tool for tweaking your program to perfection.

However, do note that if you're measuring immediately after a session, the new hires won't actually know if it helped them or how useful it was, as they won't have had the chance to put what they learned into practice.

That's where your second set of qualitative rep data comes in.

Method 2: analyzing behavioral impacts

Once the new hires have started actually applying the learnings from your program into their daily work, it's time to get their feedback.

From the beginning, you know what behaviors you want to instill in new hires who complete your onboarding program. This is your opportunity to see if the program is doing its job in actually conveying those behaviors.

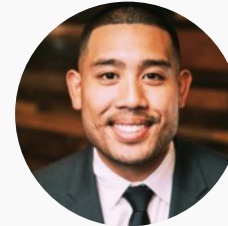
After a period of time, be it one month, three months, or six months, you'll be able to get a deeper level of feedback from reps who have graduated from the program. This feedback will be key to shaping future programs.

What sort of questions should you ask these reps? Think along the lines of:

- How helpful was that module?
- Can you give examples of when you applied these learnings in the field?
- Where has this material been useful?

These types of questions will provide you with more of an insight into your onboarding program and what needs to change. If you're finding out that your methodology module was considered too long and then the learnings went unused in the field, that means you need to do more than just shorten that section.

Consider the behaviors you want to drive with your onboarding program, and use the answers you get after your new hires are in the field to understand whether you've encouraged those behaviors successfully.



"Part of our feedback strategy includes these quarterly sessions to bring in all the classes that have gone through the program recently, so we can say: 'Hey, here's an hour to understand where things stand today and what we could be doing better.'"

We felt like it was really helpful to get that honest feedback, because they can leave a session feeling on top of the world, thinking: 'I'm fully ramped and ready to go!'

But of course, there are going to be moments where they think: 'I wish I learned this in that lab session because my responsibilities are a little different.'"

Garrett Rafols, Senior Director, Center of Excellence at Gympass

Skills and competencies certification metrics

In addition to the quantitative and qualitative feedback we discussed before, skills and competencies certifications, frameworks, and matrices can be great ways to track both the development of your reps through onboarding, and going forward.

Creating a framework or matrix where you can track skills, competencies, and behaviors helps you set a baseline for expectations.

Perhaps you can score each “skill” on a scale of 1 to 5, with one being “complete beginner” and 5 being “ready for promotion”.

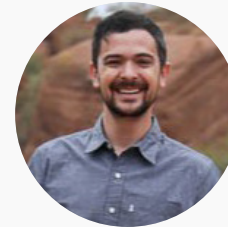
It’s up to you to cater it to your organization’s needs, but you could set a target that every rep is at level 2 for their skills by the time they end onboarding, and 3 after 3 months.

That’s just an example – you could tie three stages to familiarity, with 1 being “familiar”, 2 being “proficient”, and 3 being “advanced”.

The choice is yours – as long as it’s structured in a way that works for your organization and the expectations are clear across all the departments, you’ll be on the right track.

If reps aren’t meeting those expectations on certain skills or behaviors, you can adjust the specific part of your onboarding program that isn’t up to scratch, rather than tearing it all up. It’s all part of the flexible, iterative process of creating an onboarding program.

There is also the possibility of incorporating exams and certifications for reps, as a further check that they are leaving the onboarding program with the required skills.



“A certification is a notch on their belt, a badge on their arm, that says they have a certain degree of mastery.

“It shows they are leveraging that mastery effectively in customer-facing conversations.”

Bryan Grobstein, Head of Enablement at AnyRoad

Ongoing onboarding:

Everboarding, continuous training, and maintaining engagement

In the current sales landscape, just onboarding new hires isn't enough. Technologies are changing at lightning speed, processes are constantly evolving to meet the needs of the company and the market, and new products and offerings are continuously added.

There's always something to be improved on when it comes to achieving mastery of your sales methodology of choice.

As a result of this ongoing evolution, creating a desire for continued learning must become part of your organization's culture, and you have to instill this attitude of self-improvement and development into new employees.

Creating this culture, and setting this expectation requires a few steps:

- At the start of onboarding, **immediately set the expectation that continuous training will be part of their life with your organization**, and that this should be viewed in a positive light. Ultimately, this training helps the employee be the "best they can possibly be" in their role. Most people want to improve themselves and seek out opportunities, so let them know that this is possible at your company through continuous onboarding.
- In addition to your short-term check-ins and expectations, which should be happening near the 30/60/90 day mark, **lay out expectations over their first 3 to 4 quarters**. That way new hires know that it's not a matter of hitting that 90th day then never doing training or hearing from the enablement team again.
- **Adopt a routine of regular, ongoing, full-team training** where possible. Depending on team size and make up, regular training should be provided once a month. This training can either cover a single topic (such as a procedure change, a tech stack change, or reviewing a problem area that is showing up in your data) or something more detailed (such as new content being made available and how to use it, or new features solving a different pain point).
- **Maximize your use of scheduled training events** like sales kick offs (SKOs) or larger-scale projects such as a new product's Go-To-Market strategy, as this will help you cultivate an atmosphere of learning and development. These will take several hours, span multiple days, have differing delivery methods, and specific uptake measurements and expectations depending on the needs of your organization.

Follow these steps, and you'll make it clear that learning doesn't ever stop, because there's always new and more efficient ways to drive the organization closer to its revenue goals.

Best of all?

Employee training benefits both the employees themselves - through self-development and increased knowledge - as well as the organization. It's a win-win!

Driving engagement - through fun

If you're struggling to drive engagement throughout the onboarding and everboarding process - don't forget about fun!

Playing games and hosting quizzes can be an excellent way to create healthy, friendly competition among your learners as well as acting as a useful knowledge check. Activities like 'pitch-offs' can really raise spirits and create a culture where learning is fun.

Don't underestimate the power of fun in learning!



"Onboarding isn't "one and done" - it needs to be constantly reinforced. AI trainings can simulate real conversations with prospects, giving salespeople an interactive, engaging experience that they can do in their own time to reinforce what they've learned."

Ariel Hitron, CEO and Co-Founder, Second Nature

Part 5

**CONCLUSION
AND EXPERT
TIPS**

Conclusion and expert tips

Summary

To summarize, there's a lot of moving parts when it comes to onboarding. And truthfully, different organizations can have massively different needs when it comes to these programs.

This playbook aims to collate sales enablement experts' advice and expertise that transcends organizational differences. By doing this, it provides a starting point for those looking to implement best practices and allows anyone building an onboarding program to feel at ease.

You're not the first person who's ever had to create an onboarding program, so leverage that! Take in the expert views in this playbook, ask questions to your peers, attend webinars and events where you can learn from those who have done it before.

Before wrapping up, the next page includes a collection of general onboarding advice from veteran sales enablement professionals who have spoken at SEC's events and webinars.

Conclusion and expert tips

Bite-sized expert advice



“Be very regimented about getting feedback from your learners. This needs to occur on a regular cadence. Have follow up and mentor meetings scheduled and, above all else, be consistent and predictable with it.

“A manager coming up to a new hire and asking them how they thought something went can be pretty scary. If you schedule the time, you give them time to think about their learning and progress and give you a good answer.”

Spenser Miller-Fellows, Sales Enablement Leader at Invicti during SEC’s Sales Enablement Festival in May 2021



“Meaningful human contact remains at the core of our emotional and psychological well-being.

“However, as remote living and working accelerates, more and more people find themselves isolated. This is the last thing that you want for a new hire within your organization to feel.

“The new hire put a lot of thought and consideration as they were speaking to recruiters and interview panels to get their foot in the door in your organization.

“It’s our role to keep making them feel like they made the right decision.”

Joe Cardenas, Global Program Manager - Onboarding, Redis, during SEC’s Sales Enablement Festival in October 2021

Conclusion and expert tips



"The way that I've adapted onboarding and communication strategies for new hires is by first giving them a lay of the land. That way, they know why the communication strategies and channels I propose are important and what their onboarding programs are generally going to look like.

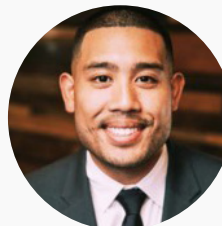
"The analogy I use for that is that onboarding (whether in-person or remotely) is a lot like building Lego.

"If I just gave you the pieces, and didn't show you the box, and didn't give you instructions, it would be pretty challenging to build it the way that you're supposed to. You can build something, but it might not be what you wanted.

"Onboarding is the equivalent of giving them a picture of what both onboarding and the end result is supposed to look like. We give them the instructions, we ask that they follow them, at least for now.

"And then we can move on to the master builder later on, building on what we've taught them."

Rachel Ha'o, Global Sales Enablement at Iterable, on SEC's Sales Enablement Innovation Podcast



"Whoever's leading [onboarding] should be passionate about the company. You essentially act as the face of your company, so you should embody your company's top culture and values.

"When an employee joins, you need to make sure that you're establishing a fantastic first impression. That person leading it needs to fully embrace and believe in your company's purpose, your mission, and the vision in which you're heading towards."

Garrett Rafols, Senior Director, Center of Excellence at Gympass on SEC's Let's Talk Enablement Panel Series

Conclusion and expert tips



“Onboarding is all about creating that safe space for people to make mistakes in that safe environment, as opposed to having that disaster happen for them. Our grads preferred to practice with Second Nature’s AI automation, because it was less pressured, and then they’re ready to go out and handle objections from the customer.”

Susan Greenberg, Global Presales Readiness Lead, SAP



“We get better-prepared people after an onboarding process, and we’ll be able to cut short the onboarding process, which means we’ll have more viable salespeople faster in the field. That in itself is worth millions.”

Sagy Kratu, Former Head of Training and Product Positioning, Check Point

Contributors



Daniel O'Dowd

Copywriter

Daniel enjoys writing, whether it's 100 words or 1,000. He has a degree in Journalism and had a stint working in sales before he moved from writing freelance, to creating content full-time for SEC.



Jack Debono

Community Manager

Jack has a passion for all things events. He loves being able to bring communities closer together and does exactly that in his role with SEC.



Faye Lloyd

Graphic Designer

Faye is our in-house graphic designer and looks at all our design requirements. She's responsible for the layout and visual elements in this report and is always happy to hear your thoughts!

