Making Successful Sales Onboarding Repeatable and Predictable

A guide for helping staffing leaders accelerate new hire time to quota attainment

MENEMSHA GROUP

Introduction

You can't grow your company if you can't scale your sales organization. And you can't scale your sales organization until you figure out how to make sales onboarding ***success*** repeatable and predictable.

Consistently hiring tenured, top performing sales reps is not scalable. If it were, every company in the world would be doing it. Anyone can win the lottery by hiring one or even a couple high performers who achieve individual success. But there is a HUGE difference between *individual* sales success and success across your ***entire salesforce***. If you're serious about growth, then at some point you have to learn how to make successful sales onboarding a repeatable system.

As you will learn in the pages that follow, sales onboarding and accelerating time to quota attainment is not just about your new hire's first few weeks of employment and their training; it's about leadership, strategic planning and the ability to learn and iterate in a scientific way by leveraging data and metrics. By following this step-by-step guide, you will be able to create a sales onboarding program that accelerates new hire time to quota attainment repeatedly and predictably. Successful sales onboarding will become a strength and unique capability of your organization.

The Objective of Sales Onboarding

There are upteen things a new hire needs to know before they're 'ramped-up' and possess the same knowledge and competency level as your tenured employees. But that doesn't mean you should try to teach them *everything* during onboarding. The objective of sales onboarding is not to teach your new hires as much as possible in the shortest time period possible.

The objective of sales onboarding is to ramp up new sales hires to *quota attainment* as quickly as possible.

Most organizations deliver water-through-the-firehose sales onboarding and overwhelm their new hires. Ironically, the most common topics covered in a typical sales onboarding program, many of which are listed below, create confusion, stunt growth and distract sales new hires from what they've been hired to do; sell.

> The objective of sales onboarding is to ramp up new sales hires to *quota attainment* as quickly as possible.

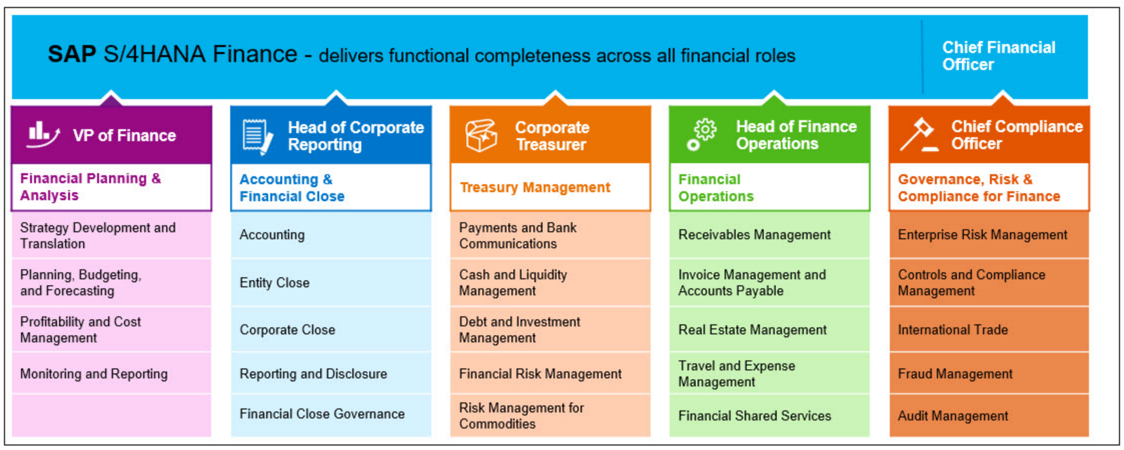
- Recruiter training (cross-functional training including shadow training)
- ATS training
- CRM training
- Diversity training
- Marketing training (marketing department overview)
- Employment law training
- Technology training (not to be confused with sales tools training)

I'm not suggesting that these are not important topics. In fact, all of these topics are very important. What I am suggesting however is these topics, and any other topics that don't lend themselves to helping new salespeople close their first deal not be included in onboarding and instead be pushed out to a later date.

Step One, Nail Your Your Niche

Trying to grow a staffing firm can be a double edged sword, *if you let it*. The good news is you can recruit for any type of candidate and skill set the market demands. There are no boundaries. The bad news is there are no boundaries, you can recruit for any type of candidate and any skill set the market demands. This paradox creates a sales onboarding nightmare.

Imagine if Microsoft or SAP had no sales engineers and they didn't segment their salespeople by product or solution and instead, *all salespeople sold all products.*   How effective do you think those salespeople would be? Imagine yourself as a sales new hire going through sales onboarding, do you think you might find yourself feeling lost and overwhelmed trying to learn how to sell every single product? Of course you would, who wouldn't?



Now, imagine yourself as the sales leader trying to onboard new salespeople. How would you quickly ramp-up new hires to effectively sell all of those products and meet quota? You get my point.

When IT staffing companies put a new sales hire through sales onboarding and teach them "we recruit any and all IT skill sets" they're creating the same nightmare scenario. This creates confusion, stunts growth and overwhelms the new hire with information overload (The same is true for staffing companies operating in multiple staffing verticals in which they ask their salespeople to sell all staffing lines of service).

There is a reason why software companies and financial services companies and medical device companies and every other industry segments their sales teams by product, vertical, niche or speciality. Without nailing your niche you overwhelm your salespeople during onboarding and kill your brand in the process.

Having a niche doesn't mean thinking small or making your market smaller. It simply means focus. Nailing your niche means focusing on a specific buyer persona with a specific pain point or problem, regardless of how many types of customers you could serve or how many types of problems you can solve.

The intention of this eBook is not to try and offer advice on developing your go-to-market strategy nor am I suggesting you overhaul the structure of your sales organization. But if your firm is a "generalist," then I do suggest, based on working with hundreds of IT staffing firms and training thousands of IT staffing salespeople, that you consider the following:

1. Don't encourage or try to teach your sales new hires (during onboarding) to call on every type of hiring manager (QA, App. Dev., DevOps, Cloud, HR, Networking, etc.) no matter how good your delivery team is.

2. During sales onboarding, focus on teaching your sales new hires how to have a meaningful and productive conversation with just one, maybe two different types of buyer personas. For example, the first sixty days focus your sales new hires to only call on QA Managers and Help Desk Managers. You can teach your sales new hires to call on additional buyer personas over time.

The point is, keep it hyper focused because *less truly is more*. Your job is to put your sales new hires in the best possible position to succeed, and the best way to build their confidence is to get them quick wins. This is how you do it.

Finally, don't try to pick the "best" buyer persona for your sales new hires to call on. Simply focus on picking a buyer persona. You can't predict where the next "big thing" is going to be. So pick one and focus on teaching your sales reps how to consistently win selling to that buyer persona. Again, you can layer in additional buyer personas over time.

Step Two, Defining Your Sales Process and Your Sales Methodology

Your sales methodology describes *how* your sellers execute your sales process including "what to say," "what to do," and "what to show" prospective buyers across each stage of the sales process. The core of your sales methodology should be rooted in the buyer's journey and understanding how your ideal customers buy from you. Rooting your sales methodology in the buyer's journey increases the likelihood that your buyer's needs remain the focal point across all stages of your sales process and that your salespeople are always coming from a place in which they are trying to help the buyer make the next decision in their buying process.

Your sales methodology must also include your **qualification rubric**. A common sales qualification rubric is BANT. BANT stands for Budget, Authority, Need, Timing. The point is, you need to establish a clear qualification rubric to ensure your salespeople pursue the *right leads* and don't ask your recruiters to work on the *wrong (unqualified) opportunities*. If you don't define your qualification rubric and train your sales new hires to that qualification rubric you will have a sales team that wastes time chasing bad leads and unqualified opportunities, both of which lead to frustration and employee turnover. This is a major reason why many staffing firms struggle with slow sales ramp up.

> Defining your sales methodology and sales process is what enables your sales onboarding to be repeatable and scalable. Until you nail this, you're not ready to make sales onboarding success repeatable and predictable.

Once you've defined your sales methodology including the buyer's journey and your qualification rubric you are ready to build out your sales process. Your sales process supports the buyer and the seller across the buyer's journey. Each step in your sales process should have measurable, verifiable outcomes indicating the completion of each stage. Every step should be tied to your customer completing a step in the buyer's journey. There should be no question whether or not a step in the sales process was successfully completed or not.

Defining your sales methodology and sales process is what enables your sales onboarding to be repeatable and scalable. Until you nail this, you're not ready to make sales onboarding success repeatable and predictable.

Step Three, Embedding Your Sales Methodology, Sales Process Into Your Sales Onboarding

Let's assume your sales process looks like this:

Your sales onboarding should include the following training modules:

For each stage of your sales process you need to have a training module that clearly defines and demonstrates how a seller completes each stage including:

1. The activities the buyer must complete and how the seller compels the buyer to complete each stage
2. The activities the seller must complete
3. The messaging including "what the seller says," "what the seller does," and "what the seller shows"
4. An explanation of the customer driven verifiable outcomes that verifies the customer has completed their activities (associated with each stage)

Step Four, Tying it all Together with Technology, Teaching Methodology

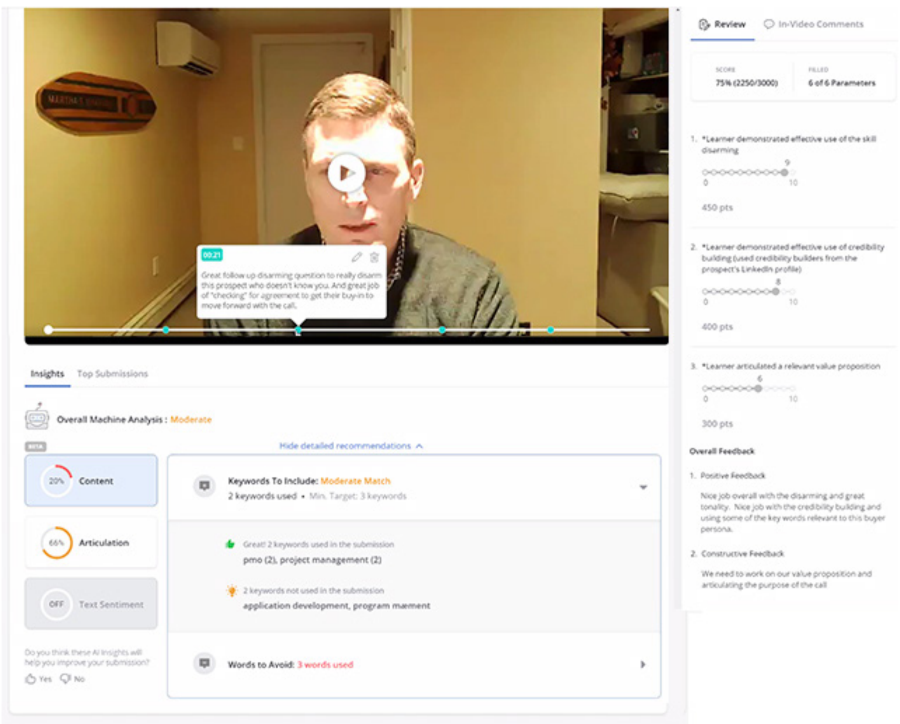
If your firm has historically relied on live, instructor led training (LILT) that is great and you should continue to offer it. But your LILT should only be one component *of the overall learning experience*. To quickly and consistently develop your sales new hires into quota crushing machines *at scale*, you will need technology because technology ensures continuity and that all learners are trained the exact same way. If you haven't already, you will need to adopt a SaaS based sales enablement platform. With sales enablement software you can (among other benefits):

- Enable learners to access training content anytime, anywhere, from any mobile device
- Physically model "what good look and sounds like" with video-based training

- Continuously and virtually assess, diagnose, and develop the knowledge, skills, and behaviors
- Identify and address skill, behavioral, and knowledge gaps with virtual, data-driven coaching
- Track and measure training effectiveness and tie it back to field performance
- Learn, iterate and improve the effectiveness of your sales onboarding

Video based training drives consistent and predictable training results because it allows you to visually standardize performance expectations by modeling "what good looks and sounds like." It delivers a consistent message and provides a performance standard for all employees to strive for regardless of tenure or experience level.

Cold Call Execution



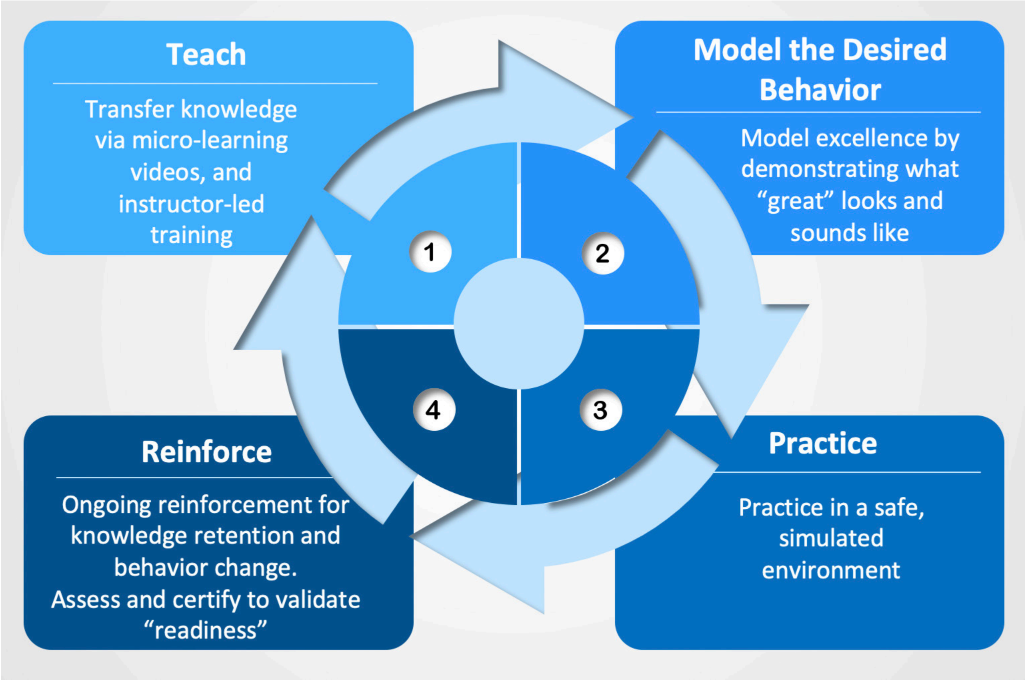
Let's assume we are creating a training video for the Discovery stage of our sales process. And let's assume our sales methodology for running the *Discovery* stage goes something like this:

- Introductions and rapport building
- Establishing call expectations
- Sharing the call agenda
- Pivoting the conversation to discovery

For step one, **Introductions and Rapport Building**, we want to create a short micro-learning video (1:00-3:00 minutes in duration) that visually demonstrates the methodology including "what the seller says," "what the seller does," and "what the seller shows" for making introductions and rapport building. Depending on your methodology, this could be one video or multiple videos.

Next, we create a video that demonstrates "what the seller says," "what the seller does" and "what the seller shows," to Establish Call Expectations. Continue repeating the process for each stage. This may result in four videos or fourteen videos, all depending on your methodology. The point is you're visually standardizing what "good" looks and sounds like and establishing your performance standard for all employees to strive for regardless of tenure or experience level. By breaking it down into small bite size training videos you accelerate learner retention which drives learner adoption, both of which aid in accelerating time to quota attainment.

Teach, Model, Practice, and Reinforce are the principles that together form the Menemsha Group Teaching Methodology



Step Five, Tracking, Measuring, and Iterating Sales OnBoarding with Certification Exams

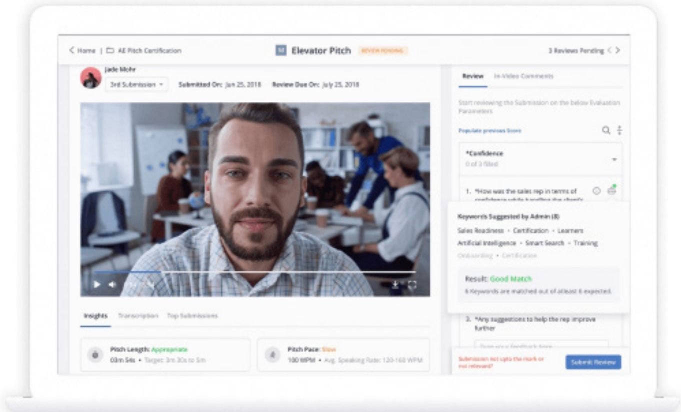
What if you need to accelerate sales hiring and sales onboarding? How many new hires can potentially shadow a top performer? Will these new hires be a distraction to your top performers? How quickly and easily can you get all your new hires into the corporate office for a new hire bootcamp? How will you quantify the success of the training? How can you audit and improve its effectiveness?

These are the questions you need to be asking because you need a sales onboarding program that can easily be tracked and measured and iterated over time for improvement based on real data.

For each stage of your sales process and the set of videos you create that model your methodology, you need to create a competency exam. Your competency exam should be challenging and include a mix of true/false, multiple choice, essay and other types of questions (having a sales enablement platform makes this easy) that test learner comprehension and retention. I suggest you require your sales new hires to achieve a score of 90% or greater on their competency exams before inviting them to the practical exams.

Next, leveraging sales enablement software you can quickly and easily build practical certification exams and administer them in an automated way. The purpose of the practical certification exam is to test your sales new hires' ability to execute the skills, knowledge and behaviors while being video-recorded in a safe and controlled environment. Begin by first creating evaluation parameters in which your sales new hires will be evaluated.

For example, your evaluation parameters for ***Introductions and Rapport Building*** might include the following questions based on a scale of 1-10:



- Did the rep smile?
- Did the rep demonstrate effective voice tonality?
- Did the rep demonstrate effective use of disarming skills?
- Did the rep ask the right amount (quantity) of rapport building questions?
- Were the quality of the rapport building questions being asked effective and relevant?
- Did the rep present him or herself as genuinely interested and sincere?

You get the idea. And yes, practical certification exam evaluation criteria is subjective and based on your sales methodology (and what you believe). Some technology including the Menemsha Group sales enablement platform includes AI technology in which the learner is automatically evaluated on additional criteria including:

- Keywords to use
- Keywords to avoid
- Speechpace
- Filler words
- Text sentiment analysis

This is how you establish performance standards, improve overall team performance and drive consistent results across your entire salesforce. This is how you certify your sales new hires are "conversation ready."

Next, you administer the practical exam by video recording each sales new hire demonstrating how they execute each step via role play. Once the role play is completed and captured on video, the video should be submitted to a reviewer, typically the sales leader or trainer who is the authoritative expert on your sales methodology. The reviewer scorecards the learner's performance based on the certification criteria. The new hire's evaluation performance is not only a reflection of their talent, but also of your hiring manager's ability to find and hire the *right* talent.

With a well defined sales methodology, highly structured curriculum and a strong set of certification exams you will be well on your way to a scalable, repeatable and predictable sales onboarding program.

Step Six, Correlating Sales Onboarding Effectiveness with Field Performance

If your sales new hire achieves high scores on their certification exams, does that predict success in the field? Do low scores predict failure? What do you do if you discover there is no correlation between certification exam results and field performance? These are the questions you need to ask. The strength of the correlations will give you insight into which aspects of your training have the biggest influence on field performance enabling you to iterate for continuous improvement.

In your CRM or ATS, you must have a reporting system set up that tracks conversion rates. If we go back to our sales process which consists of *Identify, Qualify, Discovery, Take Job Order* and so forth, we need to be tracking the following:

- Number of leads identified and worked (being worked)
- Average number of connects (two-way phone/video conversations) per lead required to qualify and convert lead to qualified prospect
- Average number of days required to convert a qualified prospect to the discovery stage
- Average number of days to required to convert qualified prospect from discovery stage to take job order stage

By iterating your sales onboarding program, you should be able improve your sales funnel conversion ratios and accelerate your sales cycle.

Step Seven, Give All New Sales Hires The Same Quantity, Quality of Sales Leads

We've covered the "training" component of sales onboarding but sales onboarding doesn't end there.

Studies show that the most common contributing factor that delays time to quota attainment is a lack of sales leads. Specifically, sales new hires either don't have enough leads or they waste valuable time calling on the *wrong* leads. Here is what happens in most staffing firms.

Sales leaders expect their new salespeople to cultivate enough leads and convert them into qualified prospects and eventually opportunities and paying customers all on their own (this would *seem* to be a very reasonable expectation). Sales leaders also "help" their sales new hires by making the following suggestions:

- "Here is the local business journal, you should start calling on these companies A through Z"
- "Dan was our previous sales rep, I'm going to hand Dan's accounts to you so you can start calling on them."
- "Your sales territory is <insert zip code/county/city/state/region>, you can call on any of these accounts in this geography."

Fast forward three, six, nine, twelve months and you discover a very frustrated sales leader. Why? Because their sales new hire still lacks direction and is spinning their wheels trying to figure out who to call. They have qualified/disqualified far too few leads and have generated very few, if any new opportunities. How could this be given the support and direction given by the sales leader?

Paralysis by analysis.

To quickly and effectively ramp up sales new hires, sales leaders *must* provide clear and explicit instructions on *who to call*. There is a disabling dysfunction that runs through most sales organizations, especially those trying to ramp new salespeople and it's called "chasing the shiny penny syndrome." It tends to run rampant with new sales hires because they will chase any new "shiny" opportunity in lieu of the core go-to-market sales strategy to put any lead and any deal (especially unqualified deals) on the board to impress their new boss and peers. Salespeople are like water; they will seek the path of least resistance.

Here is the moral of the story. To accelerate time to quota attainment, don't ask your sales new hires to create their own list of leads. This is what gives them *paralysis by analysis*; they don't know who to put on or leave off the list. Instead, the sales leader (who should know the market best) should give all new sales hires a named lead list that they've developed specific for each new sales hire based on:

1. Their knowledge and experience working the market
2. Their knowledge of the competition (the competitors customers)
3. Their knowledge and understanding of the ideal target customer profile (buyer persona)

When you struggle to generate enough decent leads for your sales team, everything else needs to be perfect because you have no buffer to get anything wrong. For instance;

- You need a perfect product/solution/candidate
- You need perfect salespeople
- You need a perfect sales process

The best way to grow revenue growth isn't by tripling your sales headcount; it is by growing your number of qualified leads. This is how you set your sales new hires up for success.

Getting Started

1. **Nail Your Niche:** Simply focus on picking a buyer persona for your sales new hires to call on and focus on teaching your sales new hires to consistently win by selling exclusively to that buyer persona. You can layer in additional buyer personas over time. Keep it hyper focused because *less truly is more*.

2. **Make Your Sales Onboarding Repeatable and Scalable:** To achieve this you need to define your sales process and sales methodology including your qualification rubric.

3. **Structure and Sequence Training Curriculum:** Create a training curriculum that demonstrates how to execute each step of your sales process including "what the seller says," "what the seller does," and "what the seller shows."

4. **Get a SaaS based Sales Enablement Platform:** Ensure training continuity and that all learners are trained

the exact same way.

5. **Visually Standardize "What Good Looks Like"**: Visually standardize performance expectations by modeling "what good looks and sounds like" via video.

6. **Track, Measure and Iterate with Certification Exams:** With a strong set of certification exams you will be well on your way to making sales onboarding scalable, repeatable and predictable.

7. **Correlate Sales Onboarding Performance with Field Performance:** Correlations will give you insight into which aspects of your training have the most influence on field performance. Iterate your sales onboarding to improve your sales funnel conversion ratios.

8. **Give All New Sales Hires the Same Quantity, Quality of Sales Leads:** To accelerate time to quota attainment, (sales leaders) give all new sales hires a named account/leads list, equal in quality and quantity.

Next Steps

To learn more about Menemsha Group's sales and recruiter enablement solution including how we leverage innovative technology and modern learning methods to make winning behaviors repeatable and deliver predictable revenue growth, download our eBook, **Menemsha Group's Sales & Recruiter Enablement Roadmap for Scalable Growth.** In the eBook you will discover the tools, technologies, techniques, methodologies, content and processes we employ to help staffing and recruiting firms attain scalable, repeatable success. **Download it today!**

About the Author

Over nearly a quarter-century, Dan Fisher has accumulated a successful track record in consistently driving revenue growth for staffing and recruiting firms as an individual contributor and sales leader. Since founding Menemsha Group in 2008, Dan has designed and deployed sales and recruiter onboarding, training, and enablement programs for hundreds of staffing firms. He has also coached thousands of recruiting industry professionals. <u>Connect with Dan on Linkedin.</u>

About Menemsha Group

Menemsha Group serves the staffing and recruiting industry with data-driven insights, enterprise-class performance, and industry-leading content built on more than two decades of industry experience delivered through an award-winning, sales enablement platform. See why more staffing and recruiting firms choose Menemsha Group for recruiter and sales onboarding and enablement. Menemsha Group provides an out-of-the-box turnkey sales and recruiter enablement solution consisting of:

- Content services
- Training services
- Coaching Services
- A SaaS-based, AI-powered recruiter enablement platform

Menemsha Group is also a Bullhorn marketplace partner. We help Bullhorn customers design and implement scalable and repeatable sales processes to drive Bullhorn adoption. We lead the refinement and validation of sales stage definition, alignment with the buyer's journey, exit criteria including verifiable outcomes, CRM workflow configuration, linkage to messaging, sales methodology, sales metrics, and sales forecasting.

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