

Structuring Your Onboarding Plan

Onboarding & Training: General Best Practices

- Simpler, streamlined approach
- Micro-learning
 - Approximately 50 percent of the learning content is forgotten within 5 weeks
- Overtraining can actually be detrimental to your salespeople's natural talent

Four Key Components

1. Company & Product Training
2. Team Exposure
3. Clarity Role & Expectations
4. Training & Optimization

Step 1: Company & Product Training

- **Not only company history—get them excited!**
- History of the company
- Company Culture
- Opportunities for growth
- Tutorials and hands-on practice with the product
- Quizzing

Step 2: Team Exposure

- Understanding organizational structure, roles & alignment
 - How do Sales & Marketing work together?
 - Are insights from Sales driving product in your organization?
 - Social selling training? Is sales content developed by marketing?
- Opportunities to work cross-functionally?
- Conduct the JFK Communication Exercise
 - **Ask what information you can provide to other departments instead of what information they can provide to you**
 - Encourage employees to commit to provide this information on a regular basis
 - Easier when you understand one another's day-to-day

Step 3: Clarify Roles and Expectations

How can you help your employees be successful?

- Present a calendar detailing first 30 days, outlining key opportunities to excel.
- Ask important questions:
 - What are we accountable for?
 - Why is it a priority?
 - What resources are available for getting it done?
 - How we going to measure success?

Step 4: Training & Optimization

- **SDR training key performance metrics**
 - Sales Rep Quota Attainment
 - Time to Quota
 - Conversion Rates in the Funnel
 - Time Spent on Core Selling

Teach them how to be successful...

- Training for the role: Leaders need to listen in on sales calls, review recordings, and analyze the person's performance.
- Shadowing their peers: Getting hands-on insight into the day to day

BEYOND ONBOARDING: Key Performance Indicators

- Sales optimization is impossible without coaching your team and keeping an eye out for nuanced KPIs
- Leading indicators to track for success:
 - Lead Response Time
 - Rate of Contact
 - Clicks from Sales Follow-Up Emails
 - Social Media Usage
 - Usage Rate of Marketing Collateral
 - Opportunity-to-Win Ratio

For further guidance on how to
“Structure Your Onboarding Plan,” contact us:



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