

# The Ultimate Guide to Effective Sales Onboarding



## Executive Summary

Onboarding is critical to ensure that new B2B sales reps are able to perform and contribute to the company's revenue. Research shows that companies that leverage automated sales enablement for rep onboarding observe shorter time to revenue production, quota attainment, and reduced turnover, which reveal a significant return on investment.

Although the sales onboarding process is one of the most important steps of an organization's success, it is often overlooked as sales managers don't understand the requirements for successfully ramping up a new sales rep. Most sales onboarding programs last only a week, after which sales management expects sales reps' outreach to prospects will get results. Sadly, this is rarely the case.

- **The average ramp time for new sales reps is between 6 and 12 months.**
- **Only 11% of sales reps think their company's onboarding program is effective.**

Selling Power

Sales onboarding covers all the knowledge a seller needs to do their job effectively. Skills covered in sales onboarding training can include company and product knowledge, industry insight, compliance and regulatory information, and selling skills. When done right, sales onboarding engages sellers and puts them on a faster track to meet sales targets and, ultimately, ensure success for the organization.



## Onboarding Done Right

Onboarding new sales reps is time-consuming and demands a significant allocation of resources. Sales enablement technologies can accelerate this process by equipping new salespeople with the necessary tools, content, and access to expert resources so they can quickly learn about the company's offering and how to apply that knowledge when selling. To prepare salespeople for complex customer interactions, their onboarding and training programs must enable them to obtain and retain all the information they need to be successful.

There are substantial benefits when new hires are onboarded properly:

- **23% increase in productivity in the first 90 days** (Sales Management Association)
- **12% increase in win rates in the first 6 months** (CSO Insights)
- **54% increase in the number reaching their quota in their first year** (Brandon Hall Group)
- **58% less turnover in the first year** (Wynhurst Group)
- **\$200,000 cost to replace a good B2B sales rep** (SiriusDecisions/Forrester)



## Immersive Sales Onboarding Doesn't Work

Onboarding is usually overwhelming for new hires. Many companies overload their new sellers with a lot of new information and expecting them to comprehend and retain it over a short period of time. This can be particularly challenging as they step into a new corporate environment with an unknown operational culture, surrounded by unfamiliar faces. This scenario often leads to heightened stress and anxiety, which are not conducive to effective learning. Imagine being new at a company and being flooded with a continuous stream of information that you're expected to learn in a week!



Traditional classroom-based sales training has been shown to not work. For one, it's a one-time event that doesn't allow for continuous learning. The content presented tends to be dense, and the delivery often lacks interactive elements, resulting in what is commonly referred to as "death by PowerPoint". In these sessions, new sales representatives are bombarded with information about a wide array of topics, ranging from product specifications and sales playbooks to call scripts, brand messaging guidelines, competitive product battle cards, and more. This approach fails to verify whether essential knowledge and effective selling methodologies have been successfully absorbed by each seller, and it lacks the necessary ongoing reinforcement over time.

On the other hand, placing a new sales representative directly in the field with a "trial-by-fire" approach leaves a lot to chance when it comes to their interactions with prospects and customers. This approach often yields subpar results and can significantly damage a seller's confidence.

## Your LMS Has Limitations

If you're using a Learning Management System (LMS) to onboard new sellers, it's important to acknowledge that this system wasn't specifically designed for this unique scenario. An LMS serves as a centralized repository for company-wide training, testing, tracking, and compliance certification, primarily focused on time-bound and event-driven topics like workplace safety, cybersecurity, ethics training, and compliance.

However, the LMS isn't optimized for the unique learning requirements of salespeople, and it isn't structured for ongoing daily learning experiences. It also lacks the capacity to create personalized knowledge and skill advancement journeys based on real field performance data, such as conversation intelligence analysis, skill testing, and coaching feedback. LMS systems generally fall short in terms of engaging salespeople effectively, often due to a monotonous delivery approach that can render the learning process unappealing.

**"B2B sales reps will forget 70% of the information they learn within a week of training, and 87% will forget it within a month."**

Gartner



# Automate The Onboarding Process

A significant advantage offered by sales enablement technology is that it can automate several of the tasks associated with onboarding and training new reps. This includes access to product and service information, as well as training resources like video presentations, gamification, self-directed e-learning, and training modules. Through the automation of these processes, new sales reps can get all the information they need to learn about the company's offering without having to rely on in-person training or manual processes.

**Organizations that use sales enablement technology to automate new sales rep onboarding realized:**

- **37% faster ramp-up time for new sales reps**
- **25% increase in win rates**
- **20% increase in quota attainment**

CSO Insights Sales Enablement Optimization Study

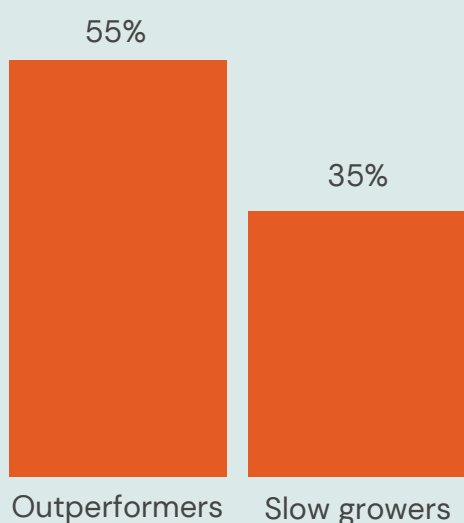
## Keep It Simple & Structured

Streamline the onboarding process and don't overwhelm new reps with information that may not be a priority at the time of joining the company. Administer this training in a structured and uniform manner, focusing on the most relevant information, organized into consumable portions (microlearning) that cater to the learning needs of sales reps. These segments should be available in an on-demand format, allowing individuals to progress at their own pace.

# Individualized Onboarding

Ensuring the success of new sales team members requires equipping them with the essential knowledge and skills for excelling in their revenue-generating role. An effective onboarding process should be tailored to the needs, experience, sales competence, and skill level of each individual sales rep, and include a mix of training, expert knowledge, mentorship, microlearning, coaching, assessments, interactive playbooks, real-world scenario simulations, and personalized development plans designed for the direct managers to implement.

**% of companies that tailor learning programs for the sale steam**



Companies where sales managers always tailor learning programs based on observed strengths are **1.3 times** more likely to be out-performers

McKinsey & Company

While recruiting the right sales talent is very important, regardless of an individual's level of experience, it's essential to recognize that each company functions uniquely, and every professional possesses distinct strengths and areas for improvement. It's crucial to acknowledge that different sales reps will exhibit different learning styles and inclinations. Therefore, offering an array of learning methodologies is essential to accommodate their diverse learning needs.



## Sales Methodology & Process Training

Before cultivating sales prowess, new sales reps need to understand the suitable way to approach each individual customer throughout every stage of the sales journey, and which activities are required when. It's crucial not to overlook the incorporation of comprehensive training for new recruits on your chosen sales methodology, which might include approaches like SPIN, MEDDIC, Challenger Sale, SNAP, Sandler, Customer Centric Selling, among others.

## Deliver Content, Training & Expertise In Sequence

Since sales onboarding training tends to present information in intensive, marathon-like sessions, it quickly becomes ineffective, yielding limited results. Focus training content on what reps need to progress to the next stage. To achieve this, establish well-defined onboarding learning paths that new sellers can follow, based on their objectives for the initial 30, 60, and 90 days. Ensure they have the knowledge, content, and insight necessary to become self-sufficient in that timeframe, including where to find information, and who to ask for help about which topic.

New sellers must understand that they will learn from various sources, including their and the team's successes and failures. This collective knowledge creates a community of expertise, extending beyond the realm of individual experience. Consequently, make sure that any sales onboarding systems can connect them with knowledge and suggest relevant materials by leveraging a recommendation engine that comprehends the context and proper sequence of sales interactions for them to effectively implement.



## Leverage Contextual Microlearning

Microlearning offers more flexibility and precision compared to conventional learning approaches. People can access information on demand when they feel focused and motivated. Unlike lengthy courses, microlearning is easily consumable, consisting of relevant "content units" designed to meet specific objectives or challenges in the sales engagement process. This approach provides just-in-time information that is contextually relevant to the customer profile the seller is engaging with, and embedded into the sales process.

## Collaboration & Communication:

Sales enablement technology also contributes to enhancing cooperation and communication between new reps and their colleagues. This includes tools like instant messaging, peer-to-peer video conferencing, and online collaboration platforms, which provide new sellers with a seamless means to engage with other members of the sales team. Improving collaboration and communication not only facilitates learning from seasoned sellers but also allows reps to build relationships with fellow peers.

**According to a study by Forrester Research, companies that use sales enablement technology to improve collaboration and communication between new reps and their colleagues experience a 15% increase in their average deal size in the first year compared to those that don't.**

## Provide Real-Time Support

Another significant benefit of sales enablement technology is its capacity to provide immediate, on-the-spot aid and guidance to new hires. This includes access to a knowledge repository (desktop/mobile and offline), a library of pre-approved sales content, interactive playbooks, guided selling tools, and the ability to connect with experienced peers for mentoring and coaching. By offering new reps this type of real-time support, they can quickly familiarize themselves with the company's sales methodologies and best practices, without the need for trial and error.



## Training Must Be Continuous

In many sales onboarding programs, new recruits are usually required to spend a week or even longer attending lecture-style classes before they are placed in real-world selling scenarios. However, this approach has a significant drawback: most salespeople will forget what they've learned before they can apply that knowledge.

The retention rate of freshly acquired information or knowledge tends to decline significantly after just 24 hours. Without consistent reinforcement, it's common for individuals to forget about 90% of what they learned within a span of 45 days. Nevertheless, there are ways to improve retention rates and make training more effective. Incorporating diverse learning techniques, such as practical exercises and deliberate repetition, can help consolidate knowledge retention. Ongoing support and coaching can also help maintain new information fresh in the minds of sales reps.

**Companies that provide ongoing training/development opportunities for sellers are more likely to have a high-performing sales team, and every dollar invested in training returns about \$4.53 (353% ROI).**

Accenture

Conversation listening technology provides audio transcriptions and valuable data from sellers' interactions with prospects that can be leveraged as a resource for ongoing training. Through AI-powered call coaching, all recorded conversations between representatives and prospects or customers are automatically imported and analyzed. This functionality grants managers insight into the genuine performance of their team members without participating in the call or meeting.

## Evaluate, Measure, And Track

The final step of a successful onboarding process is ensuring you evaluate, measure, and track the new reps' progress. Testing should not be focused just on short-term understanding, but rather on comprehension and recall over time to ensure retention of information and concepts.

Measurement and analytics provide managers with information on sellers' competency and help identify areas for improvement, pinpointing resources for additional training. These suggestions are communicated to managers alongside personalized development plans for each representative within their respective region or unit.

**"Companies that use sales enablement technology to track and measure the progress of new reps throughout the onboarding process experience a 20% reduction in ramp-up time."**

Gartner



## Leverage Sales Enablement Technology For Effective Sales Onboarding

Deloitte's Salesforce Effectiveness Study found that companies with comprehensive sales training programs outperform those without by nearly 20%.

Sales enablement technology can expedite the onboarding of new sales reps by automating training and onboarding processes, providing real-time support, improving collaboration, and tracking progress. By harnessing these capabilities, organizations can help new hires quickly learn about their products, services, and sales methodologies, reducing the time it takes new sellers to become productive members of the team.



## About TEG

The Enablement Group is your sales readiness and enablement partner. We deliver the sales performance outcomes your organization has been looking for by combining advisory services, learning, content, and sales tool creation with a technology delivery platform and program management.

We package the right training, expert knowledge, content, and selling tools that work best for engaging with specific customer profiles and buying personas at every stage in the selling process. Our sales engagement platform (open source, best of breed) automatically delivers it in the timeframe when it's needed – whenever seller-to-customer interactions happen (either on or offline).

**Join TEG's Readiness Community: SOR Academy**



**The Enablement Group**  
65 Water Street  
Laconia, NH 03246  
+1 603 696 5315



info@enabletheteam.com  
www.theenablementgroup.com