An Organized Approach to Navigating the Onboarding Process

The days of "mass onboarding" are numbered. What is needed for the next gen salesperson is a dynamically tailored and personalized onboarding experience based on individual need.

A traveler was lost in the countryside of Ireland. Seeing an elderly man walking his dog along the country path, the traveler stopped his car and rolled down the window. "Excuse me," the traveler said to the old man, "I'm trying to get to Kerry and am terribly lost". To this the old man replied, "If I was heading to Kerry, I certainly would not start here."

We all need direction to get from where we are to where we want to go. So how do you provide the right map to ensure your salespeople can master the critical aspects of their job prior to being thrown into the deep end to hit a quota?

In the old days, when planning a trip, you did so by plotting out the route using a map. Two folks driving from Boston to Cape Cod would likely plot identical routes, using their trusty Rand McNally, even if they were leaving at different times.

Today, those two people will use a navigation system like Waze. Their routes will likely vary, as Waze dynamically alters the route based on traffic conditions and the preferences of the driver. (Do I want to make any stops along the way? Do I prefer non-toll roads?) They still get from point A to point B. But how they get there will vary based on real-time conditions.

For the sake of this blog, we are going to focus on the skill development of new-hire salespeople, not from the 1990s Rand McNally paper-based map, but the new advanced "Waze" approach—leveraging technology to ensure your newest team members get to where they are going with as little pain as possible, with ability to tailor the journey based on the individual needs of these new hires.

The ability to dynamically alter the onboarding process based on market conditions, the ability of the individual rep, and the rep's own ability to take ownership of mastering the required competencies are the new directions for onboarding.

Here is the map we recommend:

Establish a competency model to assess against and train to. In this map, what are the best roadways to take? Consider critical competencies as the highways—the fastest way to get to your destination and to get results. Consider the country/county/back roads as beautiful scenery and "nice to haves," but not necessarily the fastest way to get results.

It is important to note that most organizations may view these competencies a little differently and may not agree with what we have decided are critical here. (This may be dependent on the vertical, technology vs. commodity, etc.)

Our highways to results:

- Activity/Territory Management
- Discovery/Information Gathering
- Prospecting
- Getting the Appointment
- Opening the Call/Meeting
- Developing a Coach
- Knowledge of Your Company's Business
- Presenting Effectively
- Creating Customer Value
- Closing/Gaining Agreement

Our country or county roads or “nice to have’s”:

- Objection Handling
- Social Selling
- Opportunity Planning
- Pre-Call Planning
- Communication: Dealing with Voicemail/Email/Video

Now that we have decided what is critical, how do we get to mastery of these critical competencies? Our approach follows a four-step process:

1) Sequence the competency for expected mastery. We suggest following your buying/sales process and aligning the required competencies appropriately (e.g., starting with prospecting skills early on and negotiation skills later). While you need to offer flexibility as to when a rep may need to master a specific competency (e.g., I’m a brand new rep who just inherited a mature deal, and I need to know negotiation skills NOW), sequencing competencies provides that point A-to-point B road map.

2) Organize the competencies into categories. Our recommendation is to group them into selling (e.g., account planning, pre-call planning, social selling) and nonselling (completing an order, filling out expenses) and then further by internal competencies (forecasting, proposal writing) and external (opening a call, selling via email).

3) Determine how you will assess for mastery. Will it be a simple quiz or test to determine mastery of key concepts using a video-based coaching/assessment tool, where the reps submit themselves doing the company elevator pitch and get feedback? Or a live simulation, where reps are presenting to their managers, peers, etc.? This is the most important step—it answers the question: “How do we know the rep is ready?” It also allows your reps to progress through the onboarding process at their own pace—and to decide the most effective “route” based on individual needs.

4) Build the learning content for every competency. This may be e-learning content that is offered via self-serve, a live web-based training session, a workshop, etc. Every competency should have learning content associated with it.

By building out your road map of onboarding success, leveraging an assessment-centric approach and technology, you accomplish two critical things: 1) You are ensuring that before a rep sends an email, picks up the phone, or knocks on the door of a potential customer they are ready to do so (remember, buyers expect a competent salesperson and don’t care that the rep is “new”); and 2) It allows you to create a tailored, personalized sales onboarding process that today’s modern seller is looking for.

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