Onboarding Sales Reps

A quality program is not an option, but a requirement

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What does "onboarding" mean? If you said that "onboarding a salesperson" consists of doing the HR paperwork, giving a facility tour, having the new hire shadow existing salespeople for a few days and then expecting him (or her) to "hit the ground running," you are not alone. Entirely too many sales managers feel that way — and then they wonder why they do not get the results they want.

Onboarding is defined as "the time period, processes and activities that prepare your new hire to make a quality sales call on your behalf." Doing it properly requires 90 days — not nine.

The first 30 days of onboarding should be focused exclusively on knowledge. During those first 30 days, your salesperson should be a sponge. You should be focused on teaching your new salesperson everything he needs to know in order to make a quality sales call and answer at least the most common customer questions. That means teaching:

- Your products and services and the problems they solve
- Your target customers and prospects
- The specifics of his territory
- Your internal processes for order processing, shipping, billing and profit generation
- Your sales culture and sales training system

And yes, it takes a month to do that correctly. Anything you shortcut here will come back to bite you and cost you money. During this time, you should have no metrics for sales or sales calls; in fact, you should not even have the new rep making a sales call, with the exception of shadowing a current sales rep.

The second 30 days is focused on activity. Now that your salesperson knows enough to make sales calls, it is time to get him out into the field (or on the phone or making video calls). The purpose here is to have him ramp up to your normal required weekly run rate for activities — the numbers of discovery appointments, solution appointments, proposals, LinkedIn activities, etc. You do have those numbers, right? If not, you should.

During this time, you should not put a sales quota on your salesperson. Instead, the first week should be aimed at achieving 25% of the normal weekly run rate; the second week should be 50%; the third week should be 75%; and by the fourth week and ongoing, the salesperson should be hitting his normal weekly activity run rate.

The third 30 days should be focused on achievement. This is where the result can vary widely. If your sales cycle is 30 days, it is completely fair to expect your salesperson to sell some business during this time period (the expectation is that some of the proposals from month two will close). On the other hand, if your sales cycle is long, you may want to measure achievement by viable proposals, funnel size, etc. What is important is that you have a standard and are willing to live with it.

You should have checkpoints for each one of those first 30-day periods. After the first month, some sort of "graduation exercise," such as a quiz with a pass/fail number, a presentation or a facility tour that demonstrates learning is appropriate. The second month can be rated based on achievement of the activity numbers. The third month can be measured against whatever metric you have put in place based on your own sales environment.

Here is why these 30-day periods matter. Most onboarding can be summed up as, "Here's your book, here's your desk, here's your phone. Good luck. You're on your own." Many managers like to say that "good salespeople — the ones worth keeping — figure it out on their own." That is an ineffective and costly approach, and it is a great way to lose a hire that you should have won.

New sales hires typically fall into three categories:

(1) Salespeople who are so naturally gifted that they will, in fact, "figure it out" and succeed no matter what you give them — or do not give them.

(2) Salespeople for whom quality onboarding, training and coaching can have a great impact on their success or failure.

(3) Salespeople who just are not going to "get it" regardless of how much training you give them.

The bad news for the "figure it out" managers is that most sales hires — about half, but maybe in some candidate pools as many as two-thirds — fall into category two. When you do not do quality onboarding and training, you are going to lose on a lot of these hires and then you have to go back to the well, do another search and hire again — and your next hire has the same probability of success as your first.

But what about the other two categories? A good onboarding program helps with these hires, too. For the first category, the "naturals," quality onboarding and training gives them a much better basis to launch into their success. Those in the first category who would have been at quota in, say, six months, will be at quota in three or four months. That is a win in anyone's book and it will help them hit their performance ceilings more quickly. This means a strong ROI, because usually those in the first category will make better use of their training.

For those in the third category, the monthly checkpoints let you know that they are on a path to failure. In this case, the philosophy is, "If you're going to fail, fail quickly." This still saves money, time and effort over plodding along for a year or more.

Of course, a failed checkpoint does not necessarily have to lead to termination; use your best judgment. Sometimes, a little coaching or even remedial training can overcome obstacles. If you determine that you have someone in the second category, coaching is a great investment.

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Sales hiring is getting more difficult and candidate pools are getting smaller. Once you have made your hiring selection, it is incumbent upon you to make the most out of that hire. Shifting away from "I want someone to figure it out themselves and hit the ground running" toward the mindset of "I've won a good candidate and now I'm going to take the time to lock that win in through quality onboarding" is an essential part of effective sales management. You do not have to depend on good luck for your results. ■

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