Sales Onboarding Checklist:

10 Essential Activities

BRAINSHARK®

Let’s be honest: onboarding salespeople can be *hard*.

There are so many moving parts involved in getting new reps ready to sell – from leading workshops and creating content, to coordinating with sales managers and other departments – that it can be tough to cover every base. But as a sales enablement or training leader, you’re tasked with ensuring nothing falls through the cracks on your reps’ road to being fully ramped.

What milestones must your new reps achieve before they’re ready to start selling? This eBook presents a handy list of **10 key activities** every sales onboarding program should include – whether you’re refining an existing strategy or building one from scratch.

> 49% of high-performing sellers view onboarding as “very to extremely important” when considering a new position
>
> – SiriusDecisions

Sales Onboarding Checklist:

10 Essential Activities

- [ ] 1. Pre-Boarding
- [ ] 2. Buyer Personas
- [ ] 3. Product Training
- [ ] 4. Competitive Differentiation
- [ ] 5. Territory and Account Planning
- [ ] 6. Pre-Call Planning
- [ ] 7. Prospecting
- [ ] 8. First Sales Interaction
- [ ] 9. Demo Call
- [ ] 10. Follow-Up

1

Accelerate Rep Learning with Pre-Boarding

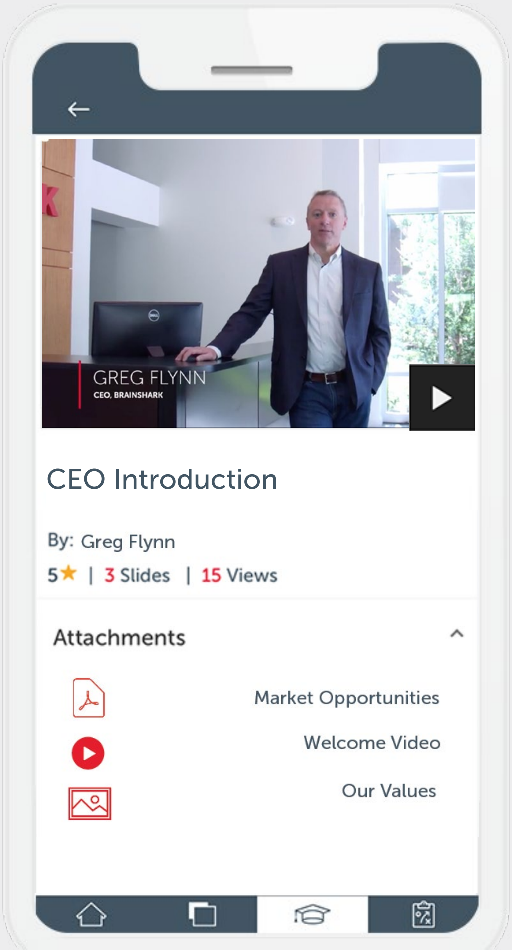
Pre-boarding is a helpful way to ease new hires into the onboarding experience *before* their official start dates. It allows sales enablement to quickly familiarize new sellers with key members of the company, jumpstart the onboarding process with a pre-learning content package, and ensure important to-do items (such as hardware and software setup) have been completed.

Pre-boarding content should present a high-level introduction to the company – covering topics such as its history, strategy, value prop and target industries – that takes 10 minutes or less to complete. Include a short quiz at the end to test reps' understanding of this basic information.

Read more: Pre-Boarding for Sales: 6 Ways to Prime New Reps for Onboarding

Quick Tip

A sales readiness platform like Brainshark makes it easy to create microlearning courses that keep reps engaged throughout the onboarding process. For instance, you could share a welcome video from the CEO or a short introduction to the company's sales strategy and market opportunities.



2

Buyer Personas Meet Blended Learning

Quick Tip

Ask your new salespeople to describe what they know about a specific buyer persona and have them share their response with a manager. Look for key details when grading the responses. For example, does the rep have a good grasp of the persona's objectives, KPIs, competitive pressures, or where they sit within the organization?

Your company only exists because of its buyers. Who are they? What matters to them, and how do they measure success? What business problems are they trying to overcome? The better new reps understand who your buyers are and what they do, the faster they can build productive client relationships.

Your training should cover key details for each buyer persona, such as common responsibilities, job titles, and KPIs. But it should also provide a deeper level of context around the challenges, risks and fears that affect each role. For example, if the buyer is often under pressure to reduce costs, your reps need to understand which factors are at play.

That's why it's helpful to use a **blended learning** approach that highlights buyer persona basics with short eLearning content, and then reinforces and builds on that information during a more in-depth live training session.

3

Product Training Made Easy

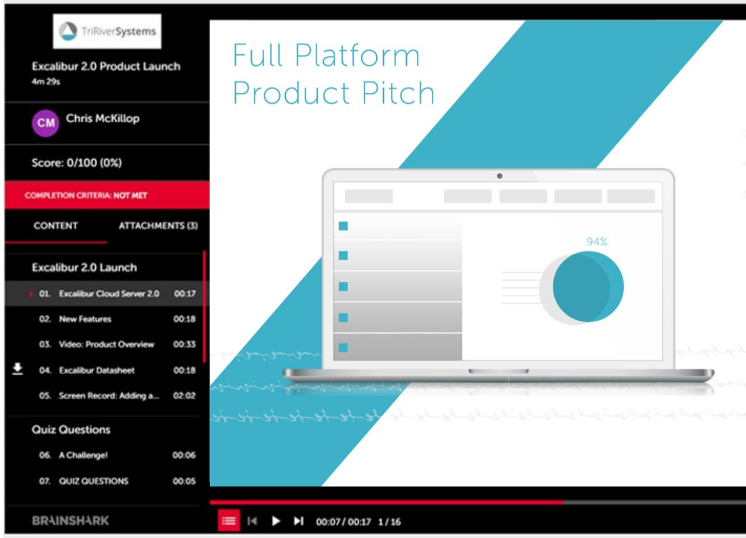
Obviously, reps need an excellent understanding of what they sell. But it's important that your product training doesn't overwhelm new hires with long-winded presentations on minute details. Instead, use microlearning content that introduces sellers to the product in "bite-sized" pieces that they can easily consume and remember. Then follow up with a live training session where members of the product management team are available for Q&A.

Focus your training not only on features, but also the *specific* ways your product solves buyer problems. Keep in mind that the same feature might carry different benefits for different buyer personas, as well.

Quick Tip

After new sellers complete product training, assess their knowledge by asking them to deliver a one-minute summary of the buyer's problem, and describe how your solution specifically solves that problem. You can assign this activity using a video coaching tool. Managers or trainers can evaluate each rep video submission, provide individualized feedback and assign a score.

Learn more: 8 Ways to Use Video Coaching for Team Readiness



4

Navigating the Competition

Once your new sales hires have mastered who you are (pre-boarding), what you sell (product training), and who buys your product(s) (buyer personas), it's a good time to apply that knowledge to the area where all three interact: **your market**, and more specifically, your company's place in it.

Reps need to understand your company's main competitors, including the strengths and weaknesses of their offerings. They should also know how to differentiate your solution(s) from alternatives in the market – in terms of product value, pricing or add-on services that a competitor may not offer.

Quick Tip

Knowing how a more experienced rep sells against the competition can give new hires a big leg up during the onboarding process. Ask veteran sellers to describe insights or proof points they share with buyers to differentiate your solution. With a sales readiness platform, you can record these responses as videos and share them across the entire team.

5

What 'Good' Territory and Account Planning Look Like

91% of sales reps believe peer learning helps them succeed.

– ATD

Sellers' abilities to understand their target accounts and the market factors affecting them is critical. But because these topics may not have reps bursting with excitement, keeping them engaged with relevant, practical info is key.

Be sure this training content demonstrates what "good" planning looks like, including best practices for identifying target prospects or customers as well as a guideline for which information should be included in each account plan. For example, which metrics matter to this buyer and how do they measure ROI for your solution(s)?

Quick Tip

Have new reps discuss territory and account planning best practices with a sales onboarding "buddy" or mentor who deals with similar clients. For example, how does the more tenured rep tailor his or her messaging based on the territory? Then, have the reps fill out an account plan template for their manager or sales enablement team to review.

6

Pre-Call Planning Best Practices

Firms that use technology effectively are 57% more effective at sales training than ineffective technology users.

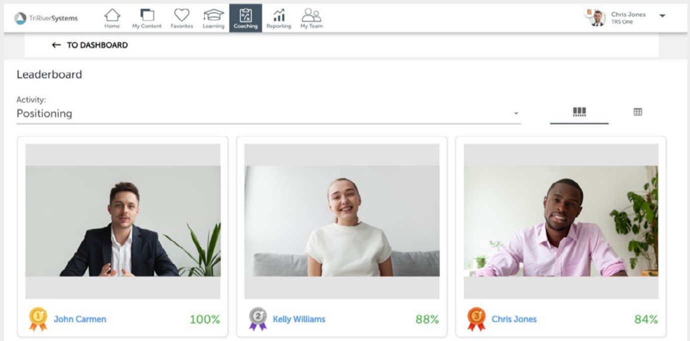
The Sales Management Association

To make the most of a sales interaction, your reps need to have a strong handle on the details. Do any public documents (e.g. earnings statements, press releases) provide extra insight into the client's business? What should the meeting agenda look like? What are the objectives for the call, and what questions does the rep plan to ask?

Ensure that your sellers know how to find sales content that would be relevant to the call. For example, if the buyer is a financial services firm, explain where reps can find finance industry testimonials, case studies or research in your sales content library.

Quick Tip

Have senior sales reps describe a best practice for pre-call planning on video, along with a specific example, and share the recording with your onboarding class. For instance, if the experienced rep looks for relevant research before each call, have them explain why they used a certain report with the buyer – and where they found it.



7

Prospecting – and Practicing – with Purpose

Whatever strategy new reps have for prospecting, they still need an approach that works with your client base. Because prospecting involves a wide range of sales activities – like social selling, buyer research and cold-calling – your training content should also cover topics such as:

- Which outreach tactics work best with your buyers
- The key traits of a great (or not-so-great) prospect
- How often reps should email or dial
- Where and how reps can search for the right prospects

For example, if your sales force prospects to senior leaders at high-growth companies, do new sellers know how to search for relevant business information? Do they understand how to use prospecting tools, such as LinkedIn Sales Navigator or a sales engagement tool?

Quick Tip

Cold-calling may be intimidating for less experienced sellers. Help them build confidence by giving them time to practice in a safe environment – whether with a live role play with peers, or video coaching activities that reps can share with a more experienced salesperson for feedback.

8

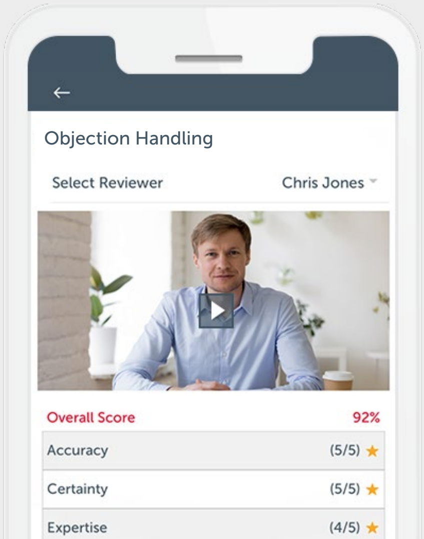
First Sales Interaction: Building Confidence and Competence

There's a lot that goes into leading that first big sales call. New reps need to be ready to ask the right questions, think on their feet, and keep their composure in front of a buyer they (probably) haven't met before.

Your sales onboarding program should cover the major do's and don'ts for opening a call, running discovery, and handling any common objections. However, the training should also cover key skills, such as active listening, to ensure your reps knock it out of the park. For instance, you could run an informal role play exercise that tests new hires' ability to listen with intent by asking them to paraphrase a one-minute business discussion in 15 seconds.

Quick Tip

Reinforce training with a video coaching activity that requires sellers to handle one of your most common objections. Managers – or peers – can provide feedback to help reps hone their objection-handling skills, and the best examples can be turned into training content for other reps.



9

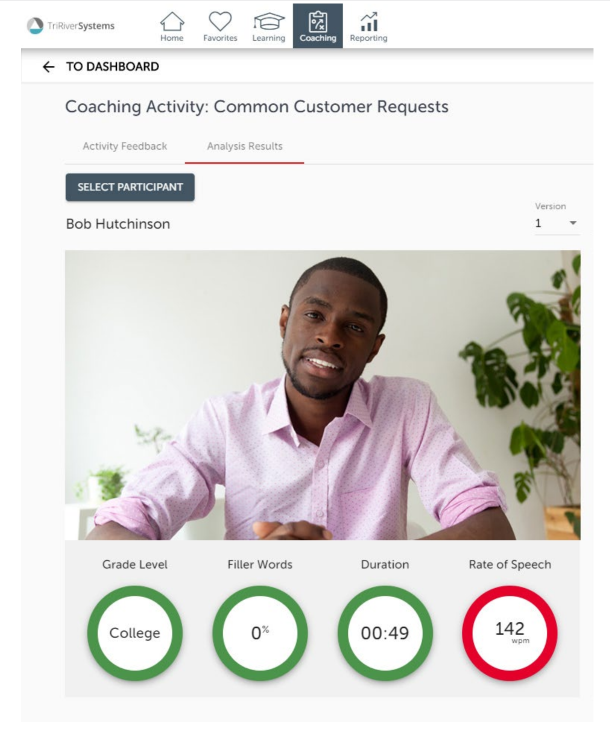
A Demo Call That Delivers

The demo call really comes down to two skills: presentation and storytelling. (OK – product knowledge doesn't hurt either.) The content and sales messaging both need to be engaging. Otherwise, reps risk putting your buyers to sleep with a long, feature-heavy demo.

Use video-based learning content to show reps what "good" storytelling looks like in the context of your product demo. Then follow with an in-person training session where key members of the sales engineering (or solution consultant) team explain how reps should work with them on demo calls.

Quick Tip

With a video coaching tool, you can certify reps' ability to position key solution(s) as they would during a demo call. Technology like Brainshark's AI-based Machine Analysis engine allows you to then check for coverage of key topics and phrases – ensuring that every seller delivers consistent messaging during demos.



10

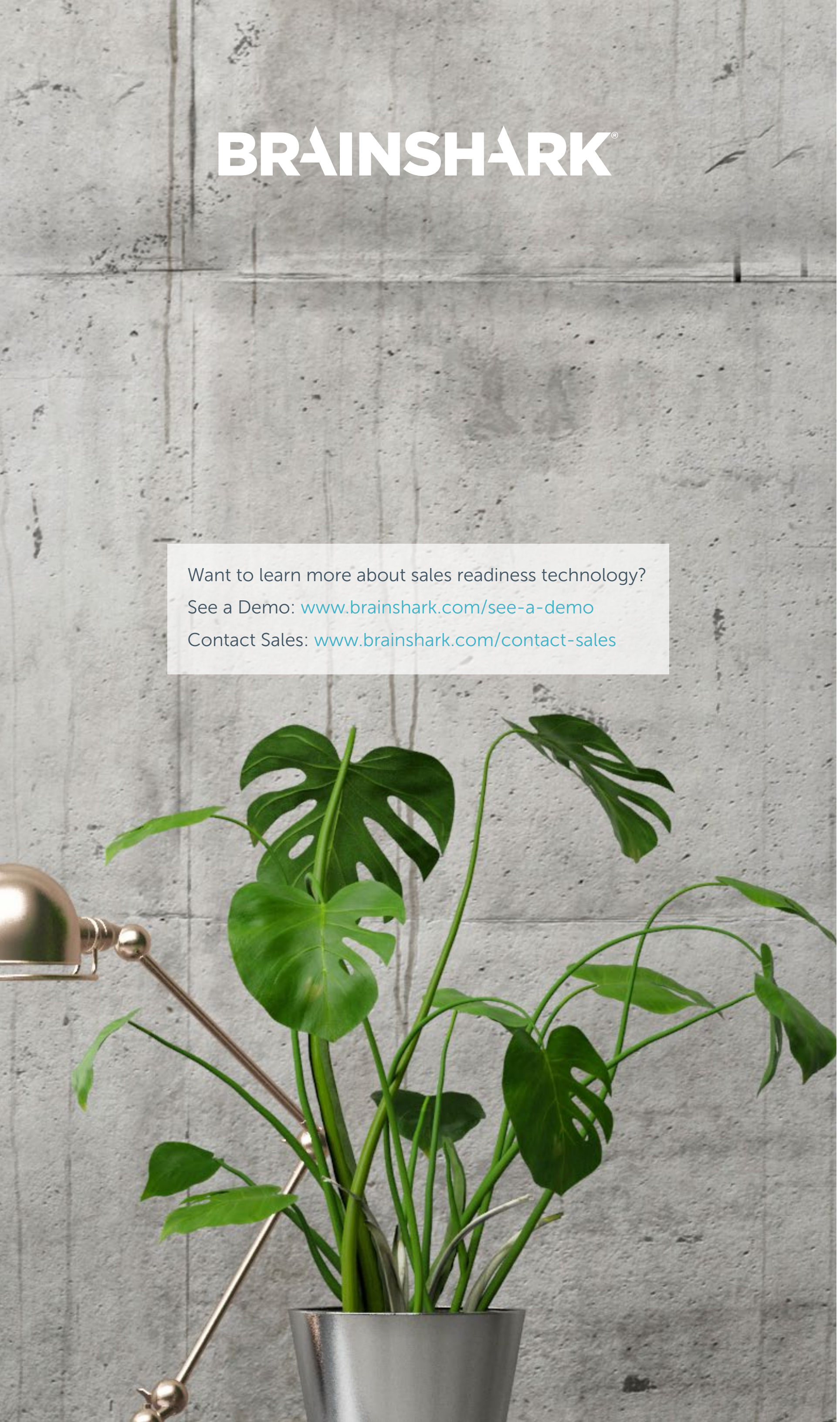
Following Through on Follow-Up

Keeping a sales opportunity from withering on the vine can be tricky, especially for new reps.

Training content should cover proper etiquette for follow-up cadences and tips for avoiding the dreaded “no-decision” outcome. When it comes to negotiations, you’ll want to ensure reps are able to protect the value of a sale and highlight the advantages that only your solution provides.

Quick Tip

It’s a great idea for new reps to shadow a more seasoned seller on a follow-up call. However, you should also set aside time for sales “mentors” to pre-brief and debrief their mentees on the call. This allows your experienced rep to not only provide key context around the call, but it also gives them a chance to discuss relevant tips, such as tactics they’ve used to move stalled deals forward. Chances are, your experienced reps will be a wealth of knowledge for the new hires!



About Brainshark

Brainshark's sales readiness platform gives you the tools to prepare all your client-facing teams with the knowledge and skills they need to perform at the highest level. With best-of-breed solutions for training, coaching, content and more, you can ensure reps are always ready to make the most of any selling situation.

With Brainshark, companies can: enable sales teams with on-demand training that accelerates onboarding and keeps reps up-to-speed; validate readiness with sales coaching and practice that ensures reps master your message; and empower sales organizations with rich, dynamic content that can be created quickly, updated easily, and accessed anywhere.

Thousands of companies – including more than half of the Fortune 100 – rely on Brainshark to get better results from their sales enablement initiatives. Learn more at www.brainshark.com.