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Ramp Time to Productivity: Why Sales Everboarding is the Secret to Your Success

Sales onboarding and training
secrets from top leaders

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hopin

Featured sales and enablement thought leaders



Rehan Chishty
Enablement Platforms Manager



Michelle Dotson
Head of Sales Enablement



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Head of Sales, Elevate Brands
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Chief Strategy Officer



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Head of Sales Enablement



Introduction: **What makes a great seller?**

Sellers need to be ready for whatever life throws at them – tough customers, changing sales targets, and big swings in the market. But what does being ready actually look like? Is it a state of mind? A certain skill set? Raw talent? Sales managers may have differing opinions on the definition of sales readiness, but regardless of individual selling styles, sales pros all agree on one thing: Sales reps need a lot of tools in their toolkits and knowledge at their disposal.

So what are organizations doing to build – and strengthen – those seller toolkits? For too many, not enough. In fact, [research](#) found that 87% of the new knowledge learned in sales training is lost within 12 weeks. The hard truth is that current onboarding programs aren't built for how sellers learn and retain skills and knowledge.

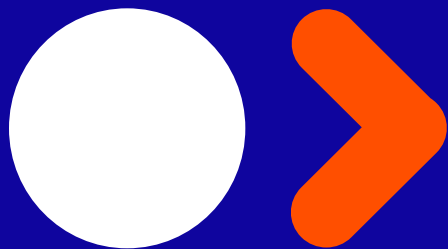
That's why a good sales onboarding program is vital for new reps. It doesn't just provide them with information about the products they sell or the prospects they pitch, but also about the personas they sell to, industry information, the questions they need to ask, objections they face, how to beat the competition, changes in the market, and more. Perhaps most importantly, exceptional sales onboarding lives long after a seller's first 30, 60, or 90 days. It's an ongoing



program that's imbued in a seller's everyday interactions and activities. But that's just the beginning. Far too many teams think enablement and onboarding are the same, and they pay little or no attention to continuous sales training: something we at Mindtickle like to call sales everboarding.

We wanted to learn more about how today's leading organizations approach onboarding and what sales leaders are doing to ensure reps receive the continuous training that is vital to closing more deals. This guide features interviews with leaders from Hopin, Okta, Sandler, Stripe, Zoom, and Mindtickle and explores how these leaders define sales excellence, ramp reps, create a culture of continuous learning, optimize sales performance, and unlock the keys to coaching. Once you've completed it, you'll have the perspectives of other leaders and can infuse these learnings into your own sales everboarding strategy.

Defining sales excellence



At Zoom, Michelle Dotson oversees the onboarding and ongoing training of all Zoom's sales reps. Dotson says these programs need to be designed with just one goal in mind: readying sales reps to do their jobs.

"It sounds simple, but it's anything but," she says.

Too many onboarding programs amount to little more than training on the company and its products – providing none of the sales focus that reps need to succeed in their jobs.

It's nice to bring everyone together at in-person onboarding sessions for a nice time and to get to know each other, she says, but being ready to sell is so much more than immersing yourself in company culture and product knowledge. It's about identifying sales excellence and striving for that perfect state. It's about assessing the new reps' aptitudes and needs and then building a program to help them attain quota and reach revenue goals.

But for Dotson, sales excellence isn't some mystical state of perfection. It's something that is quantifiable.

Okta's Rehan Chishty thinks so too. For him, two key components of sales excellence are knowledge and skills. When the Okta team sets out to help sellers obtain excellence, they set goals in the form of a certification program for sales reps, where reps are trained and then tested on their knowledge.

Establish what information your new reps need to retain about your company's products, says Chishty, and then develop levels of certification and training – for instance, novice, intermediate, and advanced – for each product or product group.

It's all about knowing your company's needs, your reps' abilities, and matching the two.

Stripe's Marcela Piñeros looks for specific competencies and attitudes she wants to nurture in her reps.



...sales excellence isn't some mystical state of perfection. It's something that is quantifiable.

Gopkiran Rao, Chief Strategy Officer at Mindtickle, explains that sales excellence comes down to being adept at helping the buyer solve whatever problem they face.

"It is the business of helping the modern buyer find a solution to whatever it is that is challenging them," says Rao. Sales excellence is being able to guide the buyer across their journey from problem, to evaluation, and then to implementation of the solution.

It's a challenge that's particularly acute in today's complex world, where sales professionals must help buyers consider sophisticated solutions to difficult problems.

"No matter where the buyer is in terms of their journey and level of sophistication, sales professionals need to be able to show winning behavior," says Rao. "In today's complex world, sales excellence isn't easy."

Qualities of a great rep

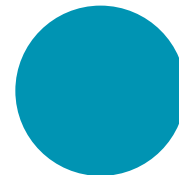
When it comes to what makes a great rep, sales leaders highlight a number of important competencies and characteristics. Defining an ideal rep profile – or IRP – outlines what good looks like and is imperative to improving your organization’s sales readiness strategy. An IRP encodes your top reps’ skills and identifies the behaviors, attributes, and metrics that sellers need to be successful in their specific roles. For example, if a rep is managing an existing account, then capturing new logos is less critical than the ability to nurture existing ones.

At Sandler Training, a company that strives to elevate the craft of selling, Damon Jones believes the traditional way of defining a good sales rep still stands the test of time: “It’s activity, skills, and results,” he says.

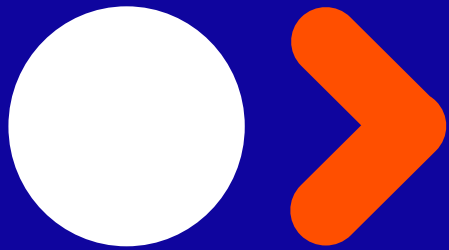
Jones defines activities as foundational pursuits like making the right frequency and volume of calls. For skills, he looks at storytelling abilities, time management, relationship-building, active listening, negotiation, and closing.

Meanwhile Derek Rahn says that, during his time at Hopin, there were three other types of factors that make up a successful rep: the technical aptitude to use sales tools, a good understanding of the company’s products and how they work, and a cultural fit.

Whatever the framework or type of salesperson, Nick Salas, Head of Sales Readiness at Mindtickle, says at the heart is a group of soft and hard skills that need identification.



Ready to ramp



Building a solid foundation is the goal of any onboarding program. While any onboarding program includes tactical training around product demos and pitches, it must also incorporate activities that build real-world rep insight and broader knowledge. Onboarding is not intended to be a be-all and end-all, but instead lays the proper foundation for ongoing success at your organization.

For many revenue leaders, the first step is coming together to encode their ideal characteristics in an IRP. So what makes top performers stand out among the rest? Usually, there are a number of common competencies and selling skills top performers have. Those skills are correlated with success in the field. Once the IRP is set, enablement programs and sales content can be aligned to deliver the knowledge and skills required to create more ideal closers.

Rao says, “The best enablement programs take participants to their first deal faster — and to a profitable deal a lot sooner, and a lot more consistently.



Michelle Dotson
Zoom

Creating engaging onboarding and improving time-to-productivity

Onboarding is essential to laying a foundation for sales success and is when reps demonstrate they understand the behaviors, techniques, and knowledge to take on real-world sales opportunities. This is why Jones makes sure Sandler training modules speak directly to real-world interactions during onboarding.

“Sales reps learn what’s directly applicable to the job they’ll do out in the field. Otherwise, why are we teaching them?” he says.

When it comes to working with Zoom reps, Dotson believes goals aren’t relevant unless they’re personal and actionable for the individual rep. Expectations need to be transparent and attainable, so she makes sure to give clear expectations from the start. But it doesn’t stop there.

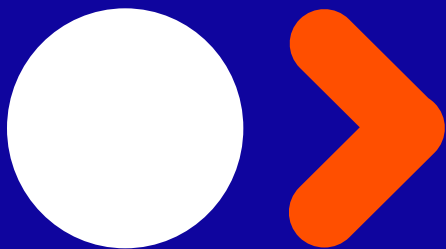
Telling someone about a goal once won’t help them achieve it. Training needs to be reinforced to be successful. ”

The right goals don’t mean much if you don’t know how to measure them in the end. That’s why Dotson uses data to build Zoom’s onboarding program.

Mindtickle’s Rao says the best onboarding comes from having a true understanding of what it means to be a successful salesperson in your field and basing training around those qualities. This is why defining an IRP is so important.

“For any given role, start by interviewing top performers. Identify what they do at every stage of a winning customer engagement,” says Rao.

A culture of continuous learning



Piñeros thinks the concept of “one-and-done” onboarding is a trap.

“There’s no end date to learning.”

Over at Zoom, Dotson agrees.

“Sales readiness is like a dream state,” she says.

But a lack of readiness isn’t the seller’s fault.

“They’re not ready because maybe there’s not enough time between the product development and the marketing. They’re not ready because you taught them something on Monday and you expected them to know how to do it in front of a customer on Tuesday and they never had a chance to practice,” says Dotson.

Instead, Piñeros, Dotson, and many other leaders believe in sales everboarding.

Sales readiness in four words is: prepare everyone for anything.

On-the-job learning can’t stop with onboarding, because every customer and sales cycle is different – and salespeople need to evolve alongside it.

Chishty at Okta thinks reps need continued training over their whole career.

“It starts with onboarding, but it doesn’t stop there,” he says.

“The idea is to constantly help reps to succeed in their current role, and prepare them with what they need to get to the next level – whether it’s as a manager or an account executive, or any other role,” says Chishty.



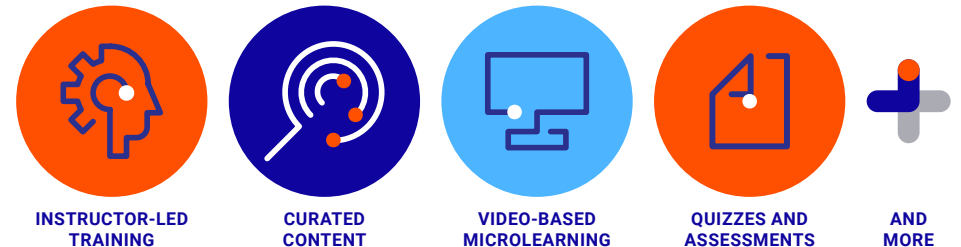
Marcela Piñeros
stripe

Those programs, says Jones at Sandler, need to be developed daily, weekly, and monthly to drive long-term success. His favorite programs incorporate repetitive activities designed to develop, test, and improve seller behaviors, techniques, and attitudes.

Mindtickle’s Rao says readiness, by definition, is ongoing.

Rao says one-time training is just “a snapshot – it’s training on a generic set of knowledge or skills and then assuming that they will remember it.”

In fact, ongoing training is the key to hitting quota. [Mindtickle and Heinz Marketing surveyed sales leaders](#) and found that, of respondents who hit 75% or more of their quota, 90% participate in sales training on a monthly basis. So what do these programs look like in the real world?








Best-in-class continuous learning might include a number of different learning formats (instructor-led training, video-based microlearning, curated content, quizzes and assessments, and more) that are individualized based on skills and needs, along with reinforcement exercises, role-play practice, and guided coaching opportunities. The combination of activities really depends on the goals of the training – as well as both individual and team needs.

But retention is going to be limited and requires frequent repetition, says Rao.

“Without an approach of continuous learning, the best training in the world can only be as good as its relevance in the moment.”



The following framework and tactics should be considered when setting the groundwork for continuous learning and sales training programs:

-  **Cadence:** timelines and frequency
-  **Skills:** knowledge, communication, negotiation, and objection handling
-  **Engagement mechanics:** tools, learning modules, assessments, and quizzes
-  **Reinforcement:** role-plays, notifications, and reminders
-  **Scoring:** reviews, certification, and manager remediations

Setting reps up for success

From microlearning to role-playing, social, and gamified training, sales leaders have a wide range of tools at their disposal to keep reps on track and set them up for success.

Sales everboarding and sales readiness require understanding the different ways people learn, what kind of information they digest, and the best ways to provide that knowledge — such as videos, quizzes, games, and self-paced learning.

“In school, you get homework for a reason,” Dotson says. “You listen to the teacher, you go home and practice, you try, and you try again until you understand the concept you’re learning.”

For information to really stick, people need to actively digest it, she explains. “They need to do something, come back to it, talk about it, and do it again. Nobody just tells you something and then you know it.”

At Hopin, Rahn uses a range of tools and methods to train sales reps, including role-playing pitches and microlearning.



People really learn quickly when you make it a game or give them information in short bites.



Derek Rahn



Hopin uses call coaching and call recording. Recordings capture great answers to tricky questions that can be shared with others. They can also identify new objections that can be workshopped during weekly all-hands meetings.

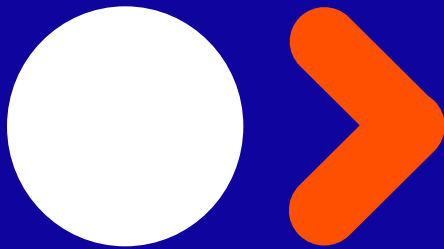
In particular, Hopin uses a conversation intelligence solution to search through sales calls. The solution identifies relevant topics or phrases, competitors’ mentions, objections, and how to move a deal forward.

Where data becomes key, says Rao, is when you can use it to track changes in sales team members’ actions with the training, reinforcement, and coaching they’ve received.

“What you end up with is essentially a list of capabilities that you know will help salespeople improve in the field,” he says.



Sales performance



When the goal is to help reps continuously improve, measurement is key, according to Jones. Best-in-class organizations not only define their IRPs, but they measure seller performance regularly so managers can work toward closing knowledge gaps and tying individual rep performance to revenue outcomes.

Damon Jones
 Sandler Training



“ It helps keep reps on track, but the goal is to find the skills that have the greatest impact on success. Not all goals are equal in value.

Different goals need to be identified and measured according to each rep's role and responsibilities.

Key Metrics to Track

Onboarding

- Average ramp time for new hires
- Time to first deal
- Successful onboarding completion

Training

- Percentage of reps hitting quota
- Training session completions
- Knowledge retention through quiz scores

Coaching

- Monthly average users
- Completion rates
- Average assessment scores
- Pipeline management before and after training
- Individual core skills and competencies
- Your sales team's overall productivity and efficiency

“The best sales readiness strategies use data to help managers diagnose where a rep is struggling and how to help them achieve success,” says Piñeros. “Data should be used not only to help individuals improve, but also to inform future development of sales readiness and enablement programs.”

“Good assessment programs show reps what they need to do and measure how well they do it,” says Piñeros. That’s why Stripe’s measurement starts with the rep’s initial sales assessment during their onboarding. Baselines are set and their progress is monitored and evaluated monthly, quarterly, and yearly. If a rep is struggling to hit certain benchmarks, the sales enablement team provides them the content, training, and mentoring to get back on track.

“Every piece of content should be connected to a competency and the progress the rep needs to achieve,” says Piñeros.

Salas at Mindtickle says most sellers prefer easily digestible learning opportunities.

“They want it bite-sized, they want it relevant, they want it to be interactive, and they want it to be memorable,” he says.

Understanding expectations is not only helpful for the reps to be successful, but it also helps managers course correct when things go off track.

Gopkiran Rao
mindtickle



Maybe a sales rep is great at learning their product information, but they don’t do a really good job of qualifying accounts, or they have trouble with objections. Once you can use your data to explain their win-loss rate, you can understand their gaps and fix them before they become a bigger problem.

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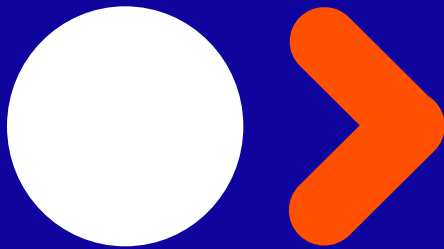
Identifying opportunities for growth

In today’s sales environment, the modern rep needs to be nimble, says Jones.

Sandler developed an overarching framework that covers everything a good rep needs to succeed: behaviors, techniques, and attitude. Sandler then identifies goals dependent on the responsibilities of the rep. These are measured and monitored, and if the rep falls short, the company provides training that is concentrated on learnable skills.

Mindtickle’s Rao says these types of frameworks help sales leaders home in on what individual reps need to improve their performance.

Keys to coaching



Sales readiness isn't just about great data and personalized training. It's about understanding how people learn. Coaching and training are part of sales everboarding, and there are crucial keys to building effective programs that will support the goals of both the revenue leader and the business.

At Okta, Chishty emphasizes the importance of making sales training as easy as possible. Sellers see their main goal is to close more deals and drive more revenue. With that mindset, any time spent not actively selling can feel like a waste.

"It's also key to understand the needs of the different types of sellers within the organization," says Chishty.

Salas from Mindtickle says when it comes to sales training, relevancy is key.

“Making the content relevant and valuable are the top two things needed to engage a sales rep. If revenue leaders can convince a sales rep that consuming the content will help them become a better seller and ultimately hit their number, then they've won them over.”

Sales professionals often see training as something that takes time from building pipeline and closing deals.

"If a seller gets disengaged, they'll just skip all the way through the content because they don't see the relevance to them. They'll just want to get back to selling."

Data should support coaching in every way.

“If a concept or goal can't be replicated in data, then the sales team will question the need not only for the training but also the underlying goal.”

And without data, Dotson says it's impossible for revenue leaders to understand the success of their sales teams.

Salas at Mindtickle says when you're putting together sales training, it's important to understand what revenue leaders need for their sellers to be successful.

"Soliciting feedback about your coaching and putting technology in place that allows you to gather and act on feedback is really important," says Salas.

"Ultimately you're doing the coaching and sales training to help the revenue leader and the sales rep."



Nick Salas
mindtickle





Helping frontline managers become great coaches

Managing a sales team is a tactical job by nature. Frontline managers are often driven by the need to achieve short-term revenue deficits but, as a result, they often can't fix the sales behaviors that caused the deficits to begin with. Companies often support the idea of promoting a coaching culture, but then they don't provide frontline managers with the tools to do anything more than emergency deal remediation.

At Sandler, Jones says sales readiness technologies make it easier for managers to coach sellers on not just deals, but also the skills needed to close deals. With a greater ability to be a fly on the wall and listen to calls, and see how sellers are scoring on assessments or engaging with training, managers can become more effective coaches.

Jones suggests managers concentrate on three essential process steps: coaching before the call, coaching while the call is taking place, and then debriefing.

At Hopin, Rahn says sales managers were often best placed to identify problems with the broader sales process as well as with their direct reports.

“Sales managers need the right tools to monitor their sales reps' progress and help make them sales-ready.”

Call coaching and conversation intelligence are powerful tools for helping sales managers become great coaches. With these in hand, managers can walk reps through tricky selling situations, showing them how to tackle specific issues during individual sales calls and throughout a sales cycle.

Okta extracts meaningful insights from sellers on the front lines.

Technology is the sales manager's best friend. It not only helps you assess your team's performance, but it also gives you the tools to help them achieve sales excellence. And, after all, sales excellence is what we're all striving for.

Ultimately, the secret to developing great salespeople isn't just one thing, says Mindtickle's Salas.

“As a sales leader you can become a trusted coach by taking everything you've learned as a salesperson — your experiences, your training, the conversation intelligence, and the content you know works, and then it's using it all to provide your reps with a way to use those things in their moment of truth: when they're in front of a prospect and closing a deal.”



Conclusion:

The endless ramp

For successful revenue leaders, sales excellence starts with a basic premise: Don't rely on assumptions. Prepare, test, and train.

Onboarding and sales training can't be done on the fly. Sales leaders need to correlate business outcomes with the skills needed to achieve them, and then develop programs that teach, test, and reinforce those skills. And it's important to remember that everyone learns differently, so managers must provide varied ways to learn the same thing.

At Mindtickle, Salas says sales readiness starts even before a rep's first day, and data is the most valuable tool for sales excellence. It not only helps everyone understand the progress of individual reps but also provides enablement leaders with insight into program improvement opportunities.

How ready is your sales force to achieve excellence? Help them be the best sales professionals they can be by taking on a sales everboarding approach and investing in continuous learning to be ready for anything.

When that moment of truth comes, your team will be ready to excel.



Build a sales everboarding program for the future

Mindtickle helps world-class companies be ready to grow revenue by increasing knowledge, understanding ideal sales behaviors, and adapting to change.

The Mindtickle Sales Readiness Platform offers industry-leading sales enablement, content management, conversation intelligence, and coaching tools – all in one place.

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