

SALES ONBOARDING ACCELERATING NEW HIRE PRODUCTIVITY

MindTickle!★

SALES ONBOARDING: ACCELERATING NEW HIRE PRODUCTIVITY

- #1 Discuss components of a best-in-class Onboarding Program
- #2 Measure and monitor key Performance Indicators of new hires
- #3 Use best practices to improve Onboarding Effectiveness

Thanks to our Sponsor



A comprehensive sales readiness platform for inside sales, field sales, and partner enablement — Onboard. Coach. Reinforce. Update.

Proven high adoption. Trusted as the strategic sales enablement partner by companies, like AppDynamics, CrowdStrike, MongoDB, Nutanix, Qualtrics, and many more.



Mohit Garg

Co-Founder & CRO, MindTickle

Mohit Garg is the co-founder of MindTickle, a SaaS platform for sales readiness. Mohit is responsible for the company's marketing and sales initiatives across North America and Europe. He previously held senior positions in management consulting at Diamond Management & Technology Consultants and PwC. He has extensive experience in building product companies and a proven track record in Silicon Valley startups, including Aruba Networks and Iospan Wireless.



Tracy Meersman

Director of Sales Enablement, CrowdStrike

Tracy Meersman is the director of learning and sales enablement at CrowdStrike, one of the fastest-growing technology companies in Silicon Valley. She previously led sales enablement at Intel Security, Perquest, EMC, and ADP and has extensive experience in solving complex sales onboarding and training challenges. She is passionate about helping others exceed their potential.

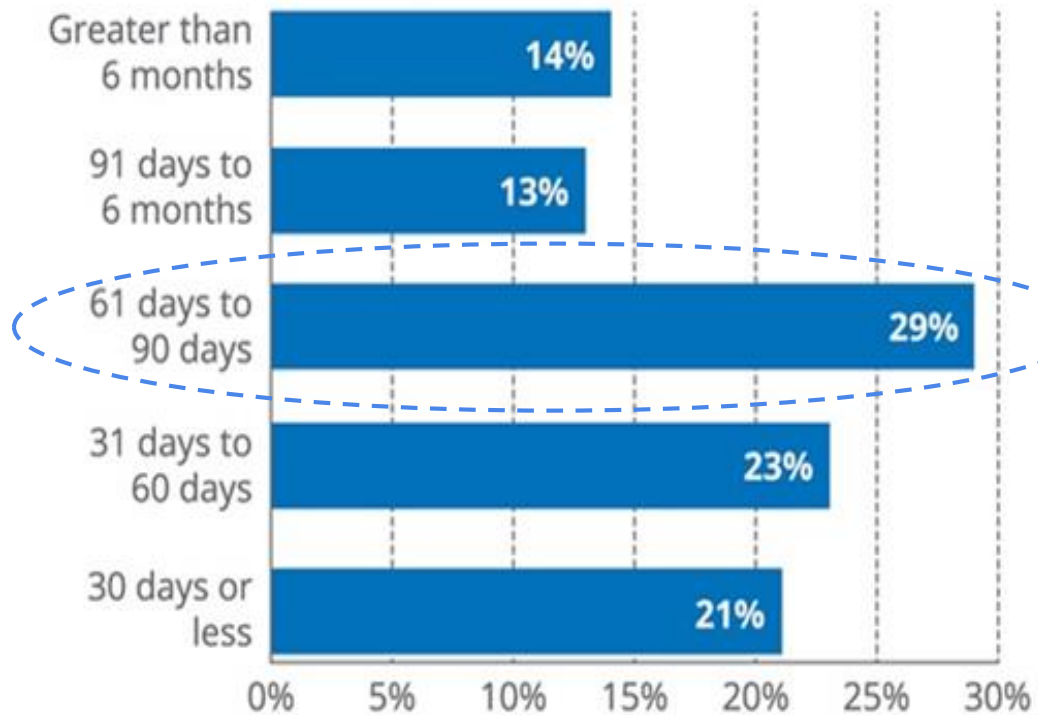
We will be taking audience questions at the end of the speaker presentations.

Please send in your questions to the moderator via chat.

Driving Business Impact Through Next-Gen Sales Onboarding

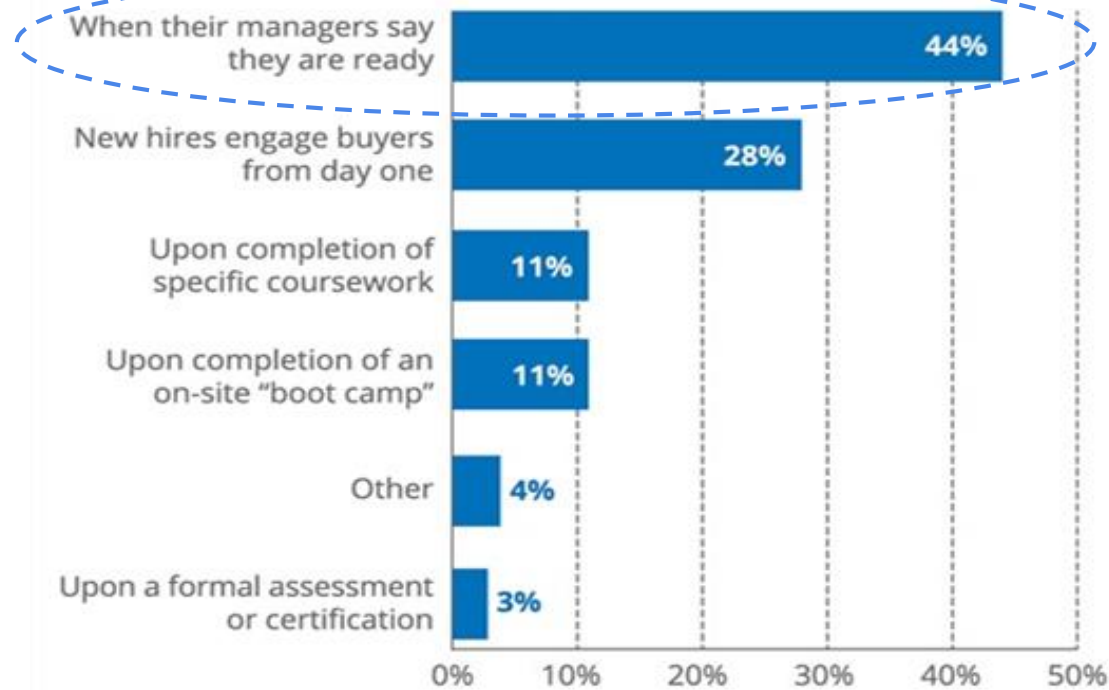
State of the Industry

Length of Sales Onboarding Program



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Sales Rep Readiness for Customer Engagement

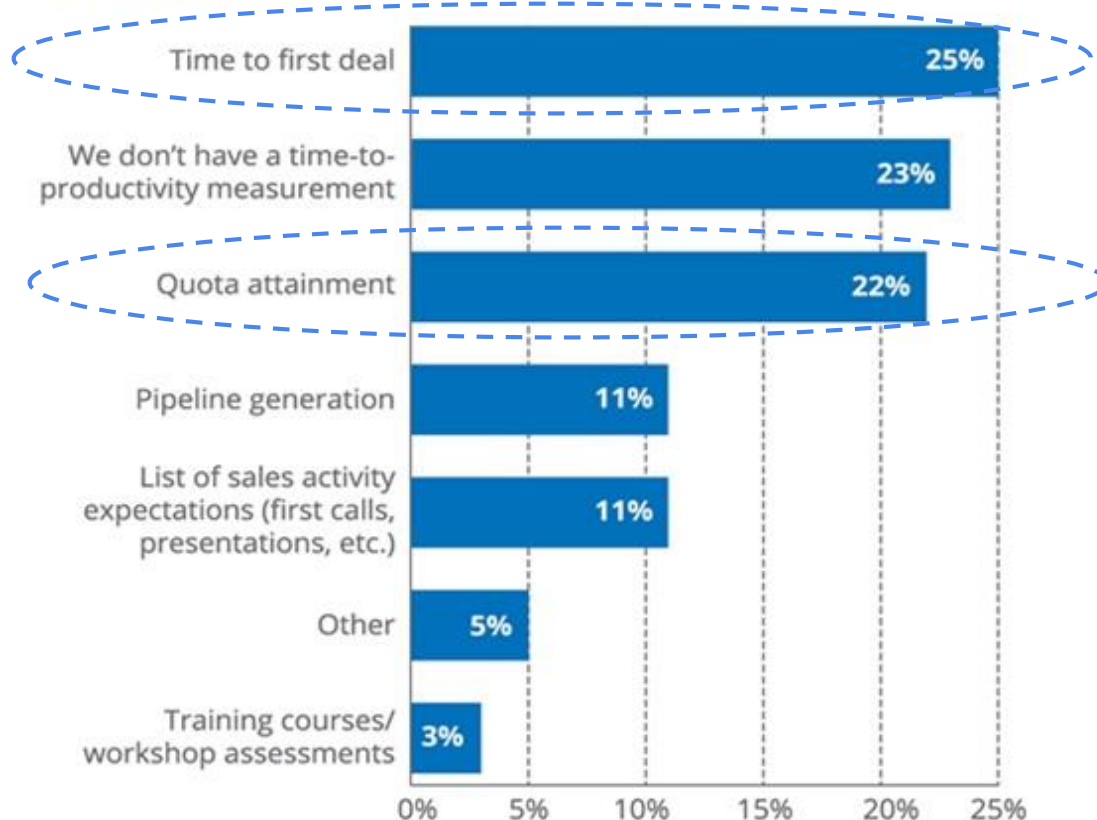


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Source: Sirius Decisions 2016 survey

State of the Industry - Continued

Time-to-Productivity Measurement for New Sales Hires



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Key Takeaways

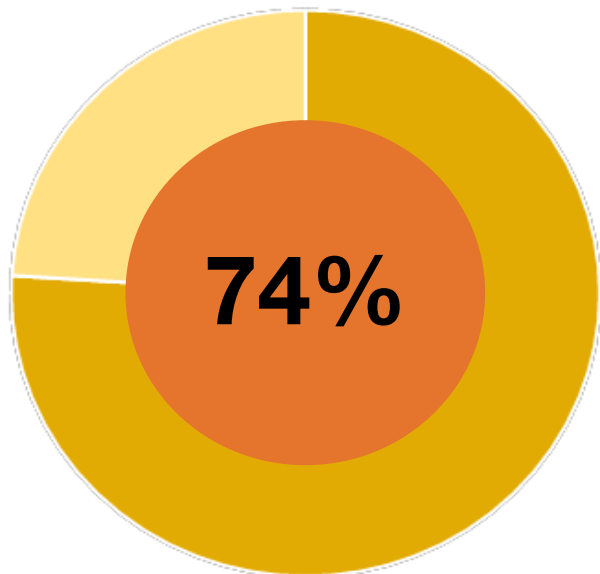
#1 The typical onboarding program is about 90 days

#2 Companies rely on the managers to determine readiness to engage prospects & customers

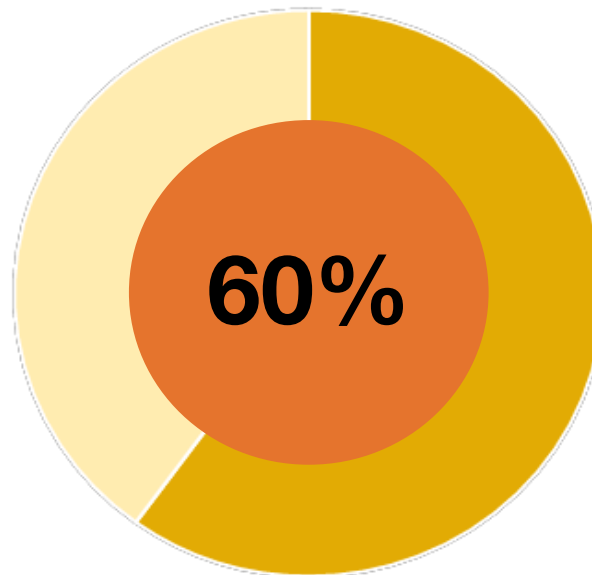
#3 Companies are tying onboarding success to first deal and/or quota attainment

Source: Sirius Decisions 2016 survey

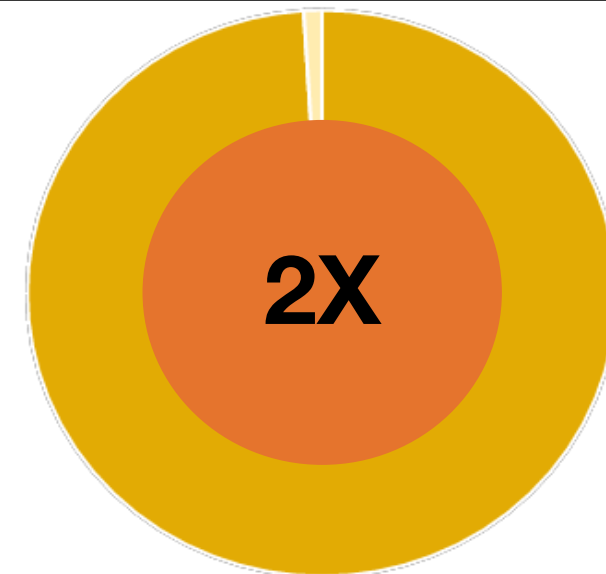
State of the Industry - Continued



Companies have a formal Sales Onboarding Program



Faster ramp up of sales hires who go through a structured Sales Onboarding Process



More topline revenue per rep earned by companies with an Agile and Structured Onboarding Process

Source: Multiple Analyst Reports, MindTickle survey of 50+ fast growing tech companies

Here are a few real-life examples of results achieved

Hyper-growth companies such as CrowdStrike and other tech Unicorns that implement a well-designed Onboarding program achieved the following results*

- Reduced new hire ramp time by up to 58%
- Reduced time to first \$50K sale from 192 days to 85 days
- Improved revenue from rep with < 12 months tenure by 21%
- Improved new hire pipeline at 180 day mark by 19%

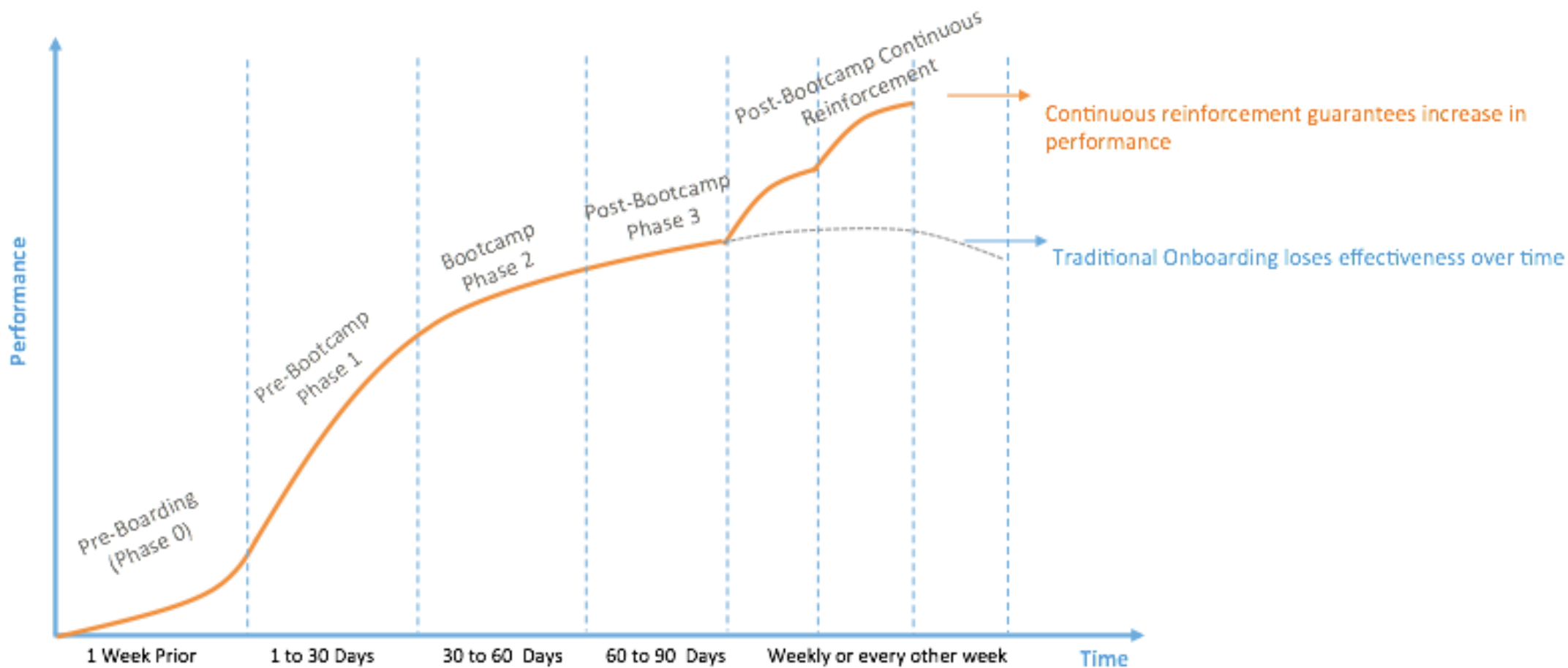
*Source: MindTickle data – real results from a broad range of customers

CrowdStrike:

How we onboard our new sales reps

SALES ONBOARDING AT CROWDSTRIKE

The Big Picture



SALES ONBOARDING AT CROWDSTRIKE

IS

● PERSONALIZED

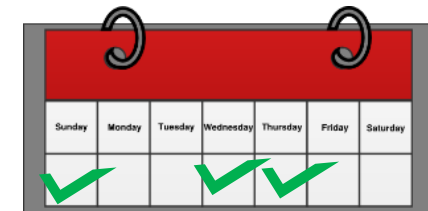
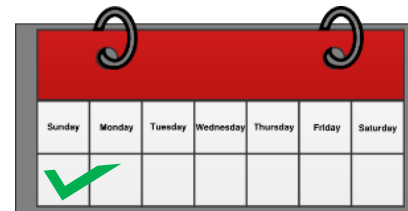
The screenshot displays the 'Sales Academy' Learning Board. At the top, there are navigation tabs for 'Learning Board' and 'Content Files', along with user profile, notification, and email icons. The main content area is titled 'First 30 Days - EAE' and includes filters for 'Completion Status - All' and 'Content Type - All', plus a search bar. A sidebar on the left lists 'My Board' items: Pre-Boarding, Pre-Bootcamp, Bootcamp, First 30 Days - EAE (selected), 31 - 60 Days - EAE, 61 - 90 Days - EAE, Refreshers, and Product Updates. The main grid contains eight course cards, each with a 'WEEK 1' calendar icon and a 'START →' button. The cards are: 'Month 1 Objectives - EAE', 'Week 1 Checklist - EAE' (with a checklist icon), 'Industry Overview', 'Product Training', 'Buyer Persona', 'Use Cases', 'Navigating Xactly', and 'Elevator Pitch' (with a 'Mission' tag).

SALES ONBOARDING AT CROWDSTRIKE

IS

● Personalized

● SCALABLE



SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized
- Scalable

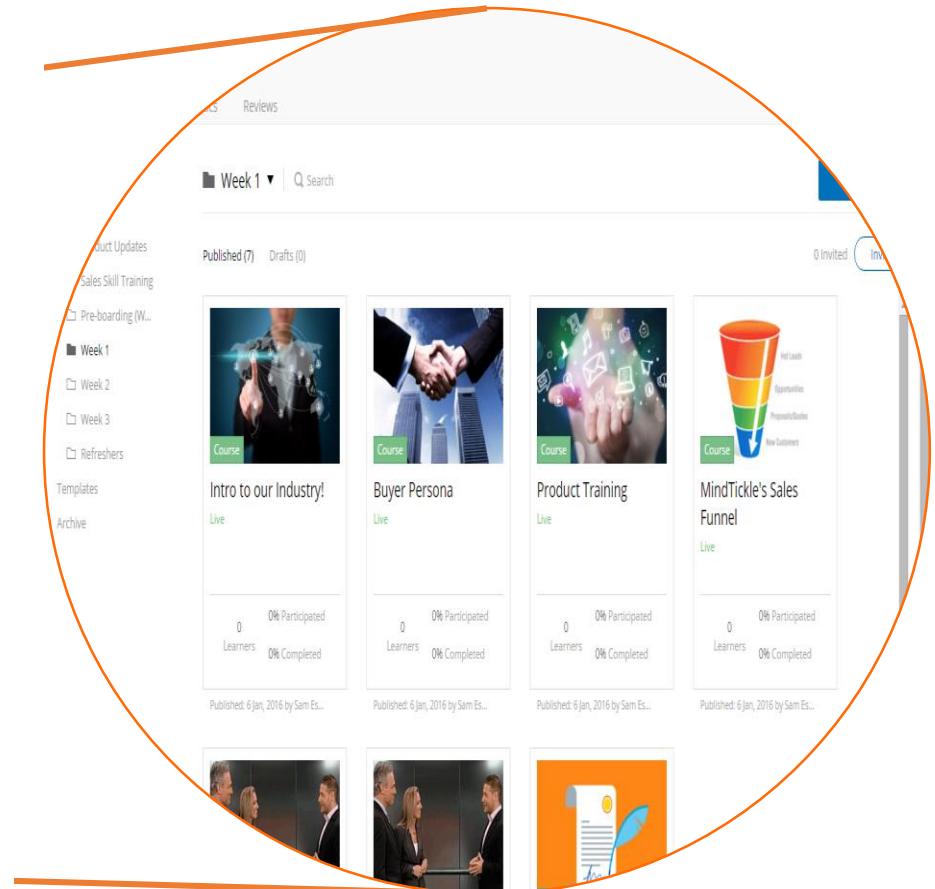
● **STRUCTURED & MILESTONE BASED**

My Board

The first 30 Days!

- Welcome to CrowdStrike
- Intro to our Industry!
- Buyer Persona
- Product Training
- + 5 More

[VIEW →](#)






SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized
- Scalable
- Structured & milestone based

● **COMPREHENSIVE WITH BLENDED LEARNING & ACTIVITIES**

Pricing Pitch

 PRACTISE & SUBMIT  REVIEWS  TOP SUBMISSIONS

🕒 Target Length - 1:00 m


Submit a 1 min opening pitch in response to the scenario described below:

You received a 'Request for Demo' from 'Michelle Clara, Sales Manager, Acme Corp, Boston. Your 30 mins online demo with her is scheduled for tomorrow.

Certificate Cut-Off: ●●●●● 3.5/5

Evaluation Parameters:

Knowledge Clarity Confidence Enthusiasm



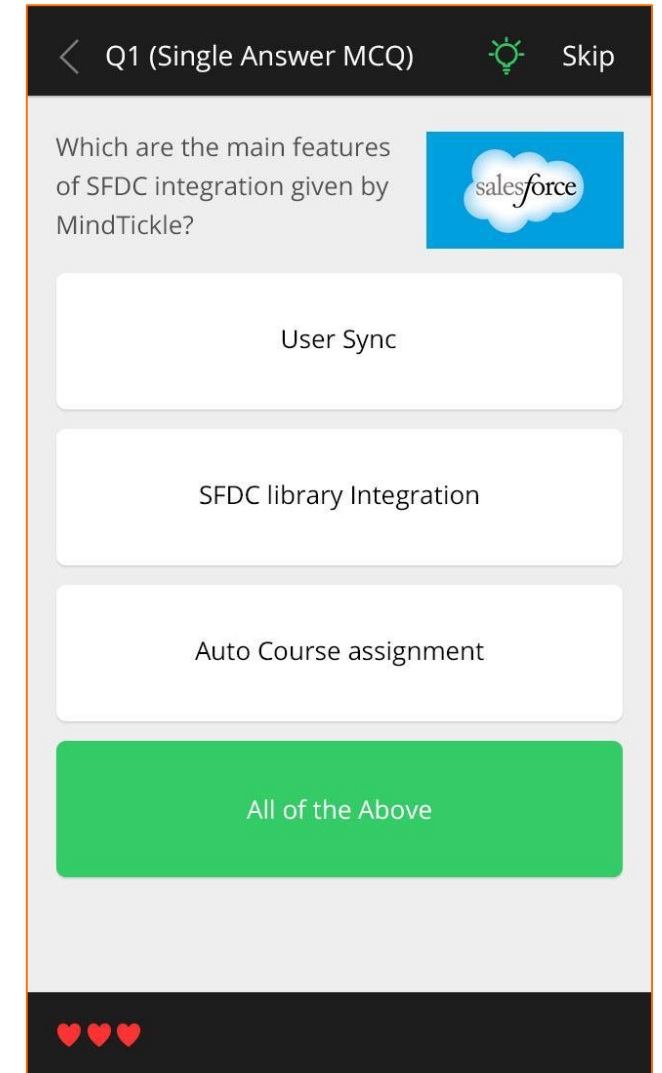
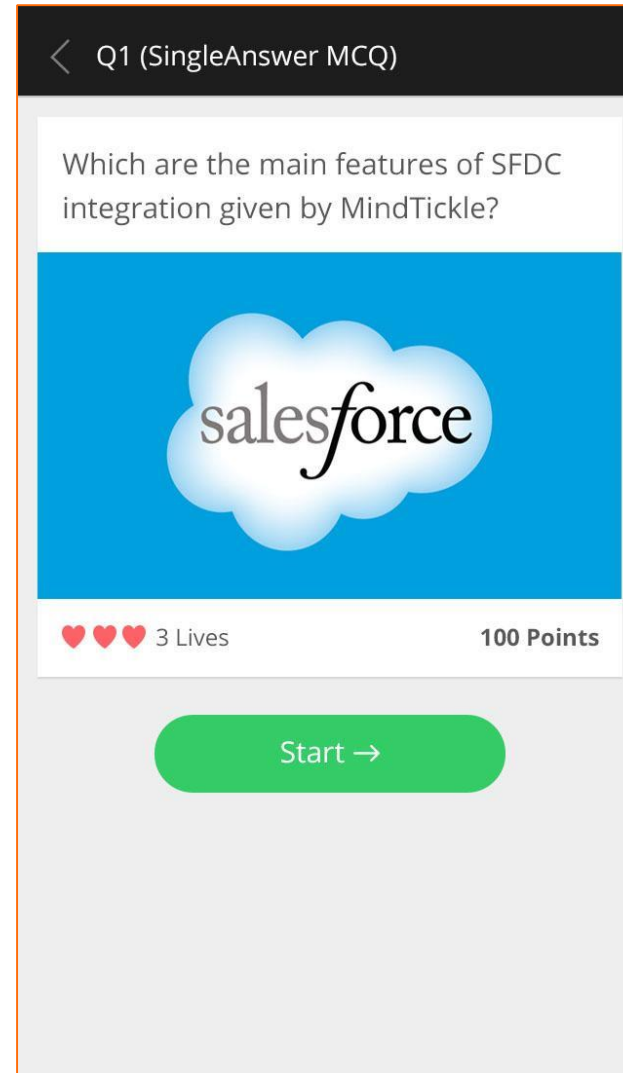
[Start recording](#)

SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized
- Scalable
- Structured & milestone based
- Comprehensive with blended learning & activities

● **INCLUSIVE OF RECALL & REINFORCEMENT**



SALES ONBOARDING AT CROWDSTRIKE

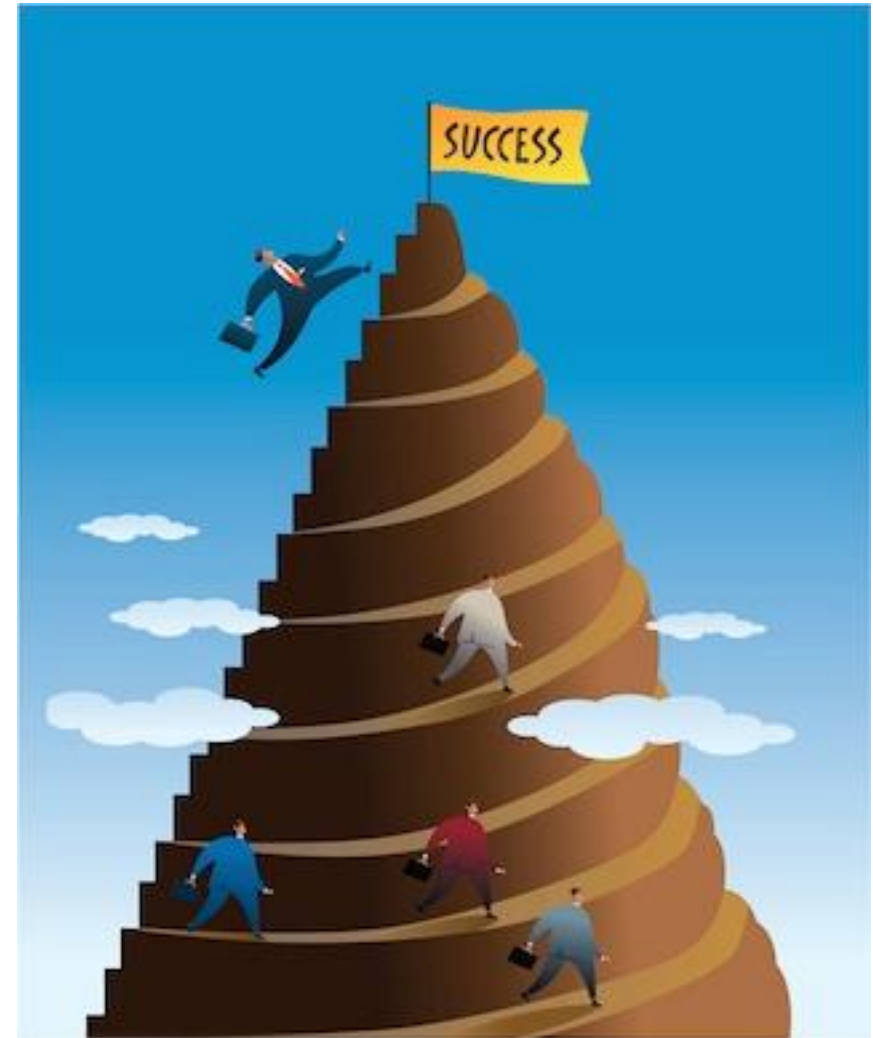
IS

- Personalized
- Scalable
- Structured & milestone based
- Comprehensive with blended learning & activities
- Inclusive of recall & reinforcement
- **ALIGNED TO REAL WORLD SELLING**




ABOVE ALL SALES ONBOARDING AT CROWDSTRIKE

- Caters to sales reps' natural competitive tendencies
- Aids bi-directional feedback for improved coaching
- Provides real-time progress to managers




IMPACT AT CROWDSTRIKE

1. 70% Sales reps achieve/exceed quota
2. Sales reps rate the overall program at 4.8/5
3. 99% of Sales reps recommend the program



*Of all my years of various onboarding / new hire trainings I will say that this was the best experience and easiest to grasp.
- New sales rep*



*You've got it down to a science, and I just wanted you to know how valuable it was in helping to get me ramped up.
- New sales rep*

Attributes of a Best-in-class Sales Onboarding Program: The MindTickle Sales Onboarding Framework

ATTRIBUTES OF A BEST-IN-CLASS SALES ONBOARDING PROGRAM



Please go ahead and add your response to the chat window:

- What is the duration of your formal onboarding program?
- What are some best practices from your programs?

1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING_T

STRUCTURED

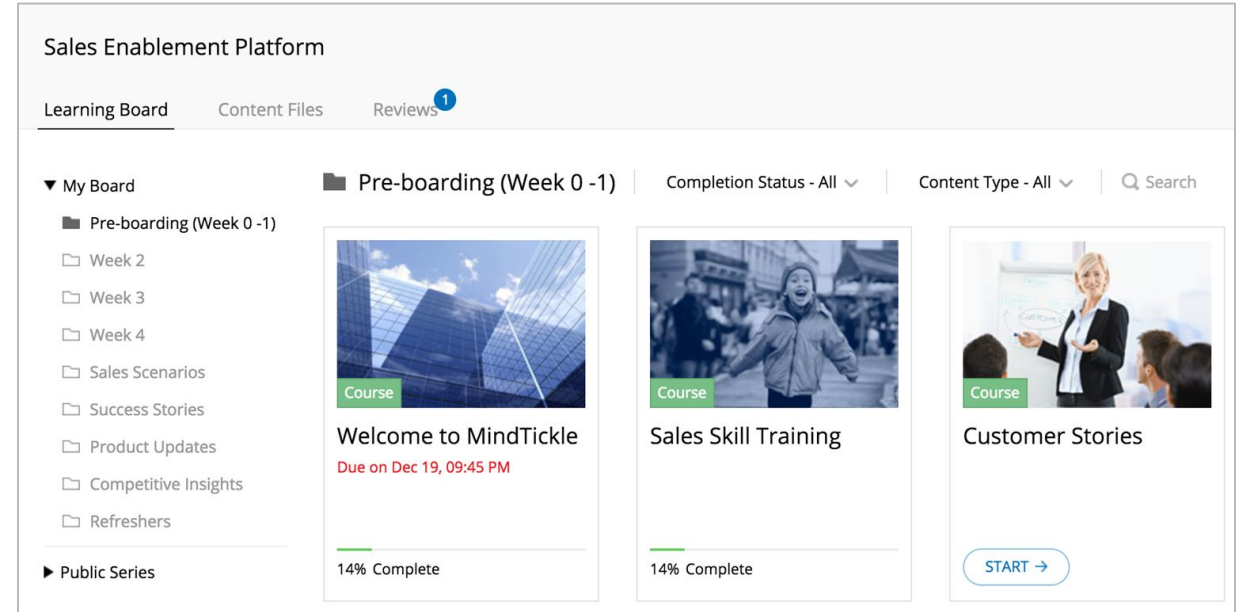
EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Milestone 1: New Hire consumes pre-boarding (non-proprietary) content as soon as they sign the offer letter and terms.



- Week 2

- Week 1

Date of Joining

1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

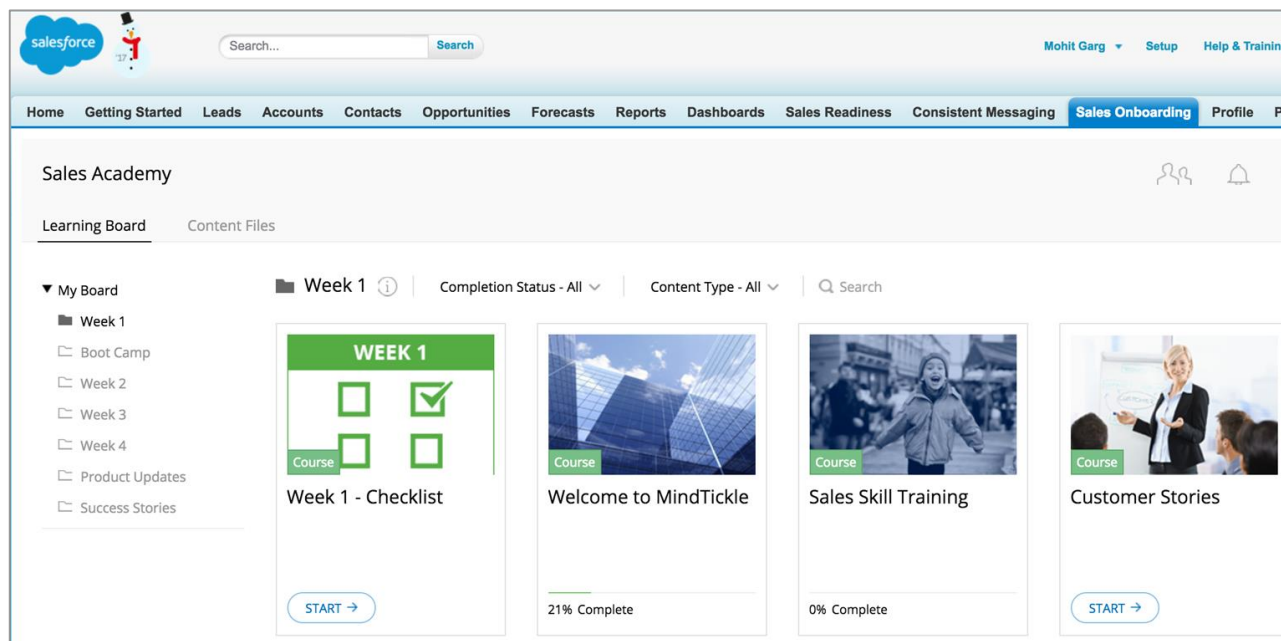
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ANALYTICS

IDEAL VS REAL



Milestone 2: New hire starts new hire orientation and pre-bootcamp activities.



1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

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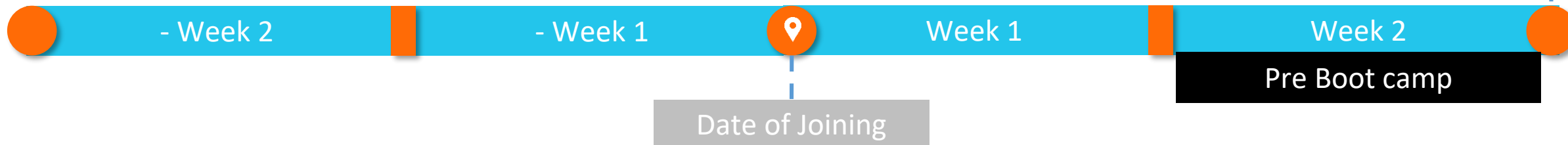
INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

The screenshot shows the Salesforce Sales Academy interface. At the top, there's a search bar and navigation tabs including 'Home', 'Getting Started', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Reports', 'Dashboards', 'Sales Readiness', 'Consistent Messaging', 'Sales Onboarding', 'Profile', 'Products', 'Files', 'Groups', and 'Chatter'. The 'Sales Onboarding' tab is active. Below the navigation, there's a 'Sales Academy' header with 'Learning Board' and 'Content Files' options. A sidebar on the left shows 'My Board' with folders for 'Week 1', 'Boot Camp', 'Week 2', 'Week 3', 'Week 4', 'Product Updates', and 'Success Stories'. The main content area displays a 'Boot Camp' section with filters for 'Completion Status - All' and 'Content Type - All'. It features five course cards: 'Product Overview - Pre-work' (30:00m), 'Agenda for Boot Camp', 'Key Highlights of Day 1', 'Assessments & Quiz' (0% Complete), and 'MindTickle Elevator Pitch'. Each card has a 'START' button.

Milestone 3: New hire is certified on Product, Success Story, and Elevator Pitch.



1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

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INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Score 4.1 (Based on 2 reviews)

Knowledge: 4 dots, 1 empty dot
Clarity: 4 dots, 1 empty dot
Confidence: 4 dots, 1 empty dot
Enthusiasm: 4 dots, 1 empty dot

Congratulations!
You met the cut-off score (3.5) and earned a certificate.

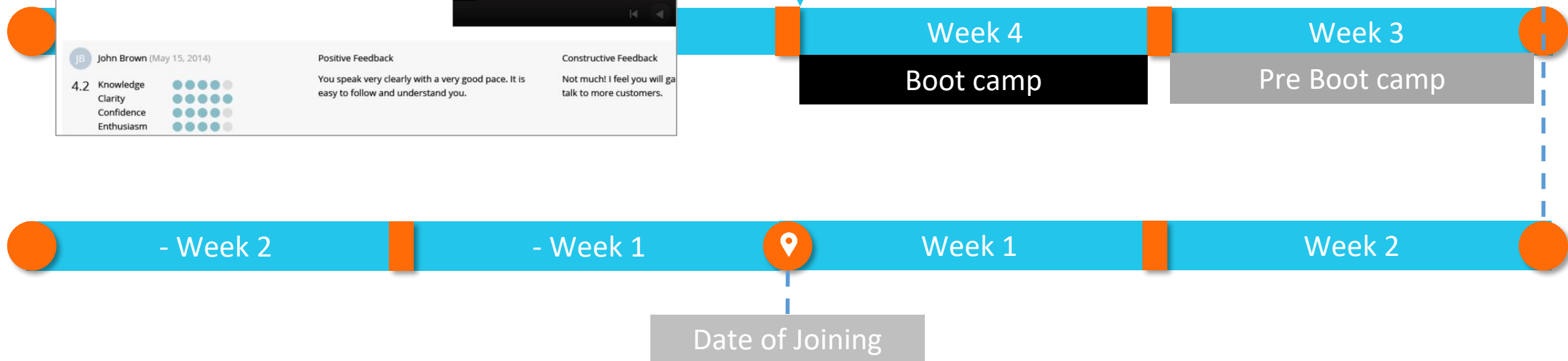
John Brown (May 15, 2014)

4.2 Knowledge
Clarity
Confidence
Enthusiasm

Positive Feedback
You speak very clearly with a very good pace. It is easy to follow and understand you.

Constructive Feedback
Not much! I feel you will gain more customers if you talk to more customers.

Milestone 4: New hire is knowledge and message certified, and meets first major sales readiness milestone. Ex.: First discovery call



1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

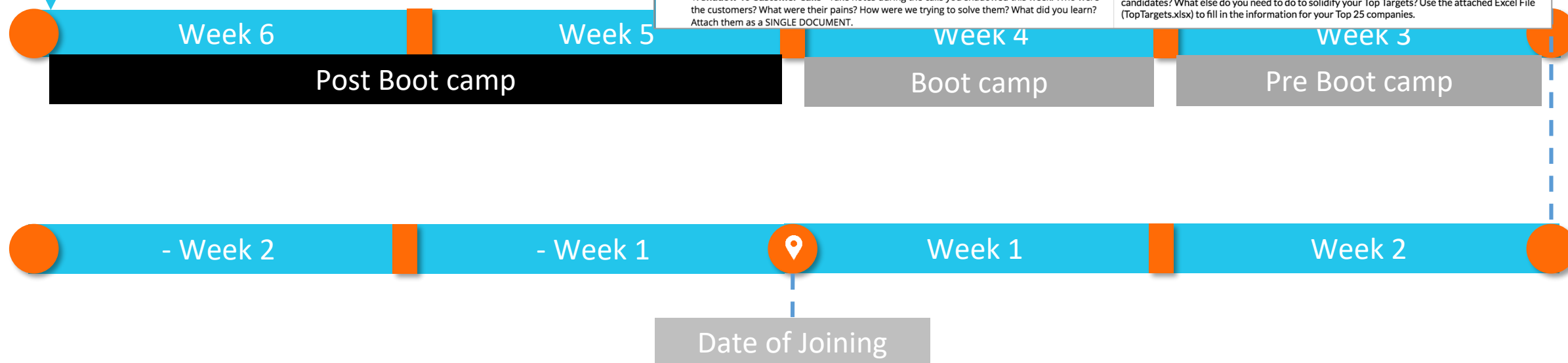
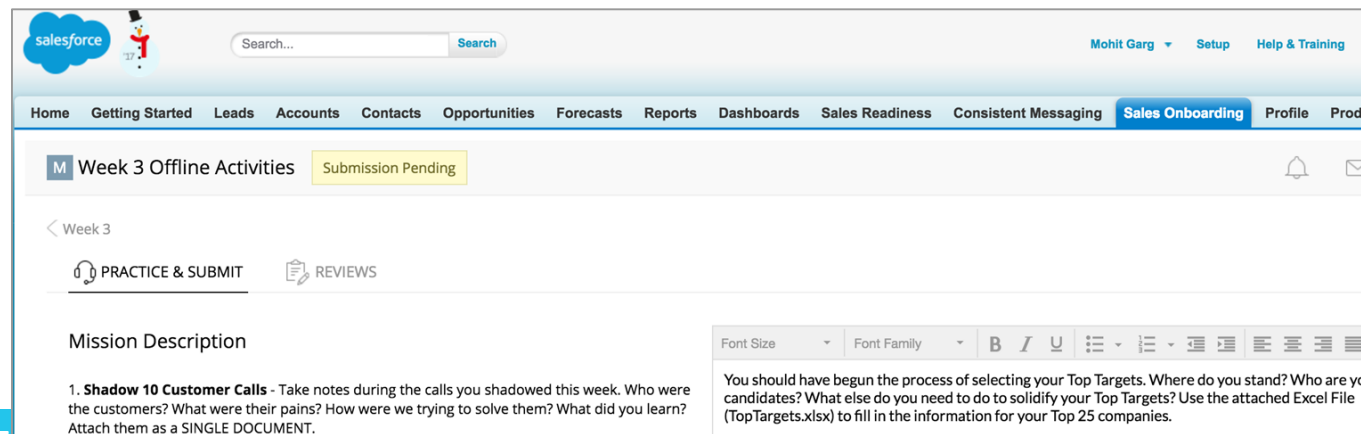
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ANALYTICS

IDEAL VS REAL

Milestone 5: New hire completes shadowing exercises and a check ride with a panel of SMEs, manager and / or seasoned reps



1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

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ANALYTICS

IDEAL VS REAL

60-90 Days

Milestone 6: New hire meets second major milestone.
Ex.: First sale

Week 6

Week 5

Week 4

Week 3

Post Boot camp

Boot camp

Pre Boot camp

- Week 2

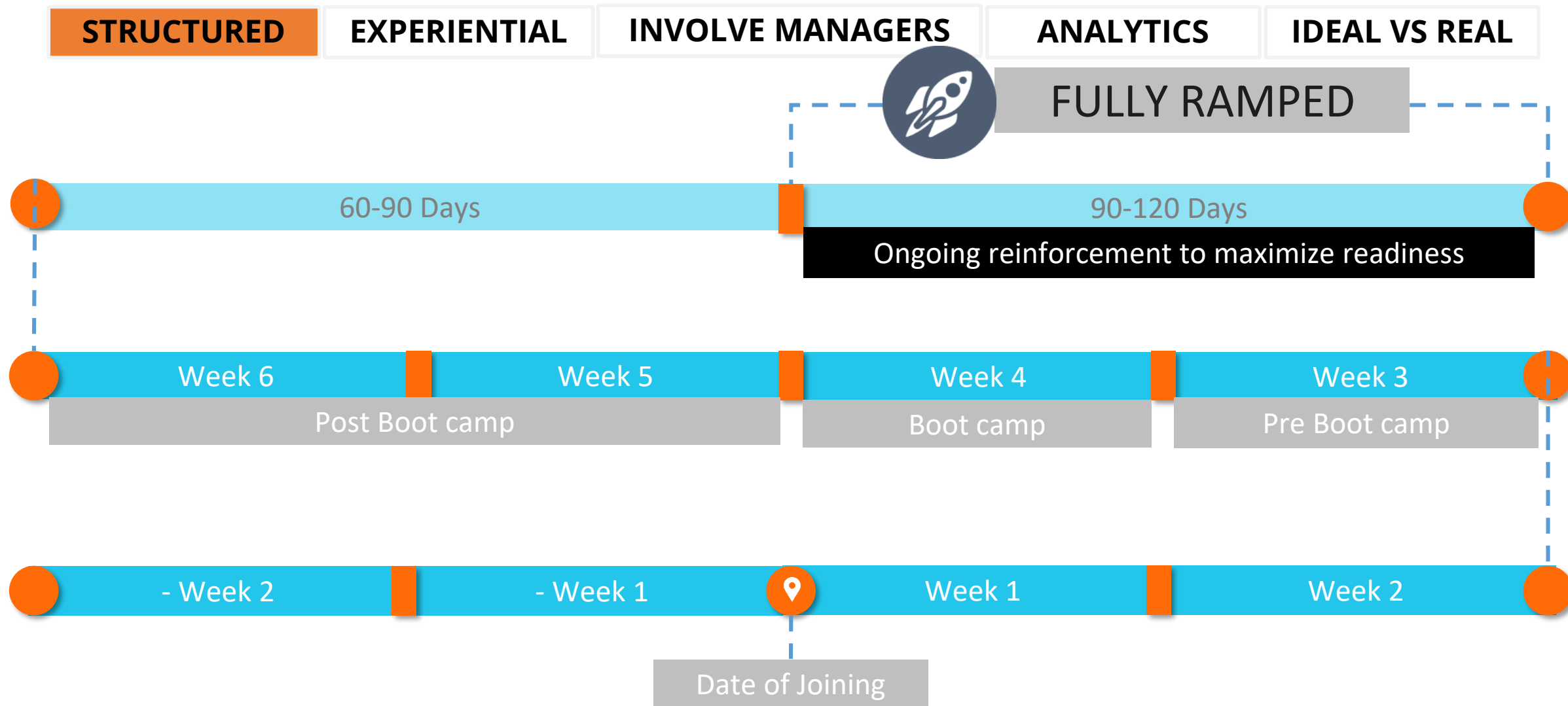
- Week 1

Week 1

Week 2

Date of Joining

1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued



2. INCORPORATES A BLEND OF LEARNING AND REAL-LIFE ACTIVITIES

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EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Champion badge screen: Reward higher badges as learners accomplish point thresholds

Check knowledge retention with our Points System

The screenshot displays a 'Product Training' interface. At the top, a progress bar shows '5345 / 5000 pts' with a red icon. Below this, three badge levels are shown: 'Beginner @1500pts' (blue), 'Advanced @3000pts' (purple), and 'Champion @5000pts' (yellow). The main content area features a 'Visual journey' with five steps: 1. Readiness Platform (checked), 2. Features and Benefits (highlighted with a yellow box and a downward arrow), 3. Competitive Positioning (locked), 4. Pricing (locked), and 5. Use-cases (locked). A 'Hall of Fame' sidebar on the right lists top performers: John Smith (5345 pts), Liz Wood (4560 pts), Mark (3300 pts), Thomas Clark (2850 pts), and Jason Johnson (2805 pts). Below the Hall of Fame, activity updates are shown, including 'Jason Smith completed Benefits. Now' and 'Thomas Clark earned 1 min ago'.

Visual journey for a quick course overview

Foster healthy competition with activity updates from other group members

2. INCORPORATES A BLEND OF LEARNING AND REAL-LIFE ACTIVITIES

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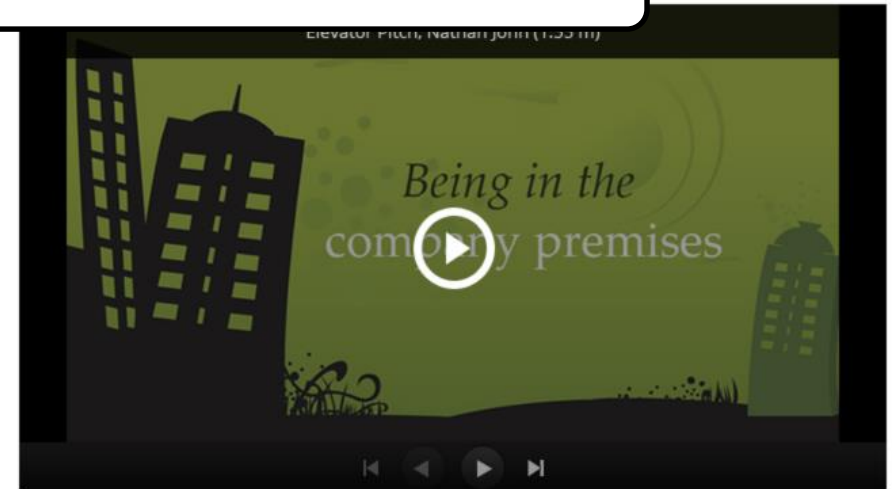
ANALYTICS

IDEAL VS REAL

- Get managers to review reps' pitches as a part of onboarding
- Facilitate peer to peer learning opportunities
- Enable and promote shadowing

Knowledge ●●●●●●●●●●
Clarity ●●●●●●●●●●
Confidence ●●●●●●●●●●
Enthusiasm ●●●●●●●●●●

Congratulations!
You met the cut-off score (3.5) and earned a certificate.



JB John Brown (May 15, 2014)

4.2 Knowledge ●●●●●●●●●●
Clarity ●●●●●●●●●●
Confidence ●●●●●●●●●●
Enthusiasm ●●●●●●●●●●

Positive Feedback

You speak very clearly with a very good pace. It is easy to follow and understand you.

Constructive Feedback

Not much! I feel you will gain confidence once you talk to more customers.

3. INCORPORATES MANAGER-DRIVEN COACHING

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INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

- Get managers for Role-play and check-rides
- Send weekly progress reports
- Get managers to review certify pitches as a part of onboarding

Hi Gregor Keller,
Here is the summary of your team's performance in Acme Sales Academy.

| | | |
|------------------------|---|--|
| Sales reps 8 | Participation 94% (Target:80%) | Completion 78% (Target:80%) |
|------------------------|---|--|

| Sales Reps | Content Shared | Completed | Points Earned |
|-----------------|----------------|-----------|---------------|
| David Judge | 108 | 86 | 25836 / 47100 |
| Karsten Flott | 101 | 91 | 29661 / 44800 |
| Bart van Knijff | 105 | 82 | 31950 / 48800 |

| Name | Day# | Completed/Assigned | Status | Avg. Score |
|--------|------|--------------------|-------------|------------|
| Week 1 | D-1 | 5/5 | Completed | 100% |
| | D-2 | 4/4 | Completed | 100% |
| | D-3 | 2/4 | In Progress | 55% |
| | D-4 | 0/5 | Not Started | 0% |
| | D-5 | 0/4 | Not Started | 0% |
| Week 2 | D-1 | 4/6 | In Progress | 72% |
| | D-2 | 2/5 | In Progress | 55% |
| | D-3 | 0/4 | Not Started | 0% |

■ Performance above 60%

Your Review

- Customer Success Stories 5
- Admits to what he/she does not know 5
- Documents to-dos during the Check Ride 5
- Engages with the audience when speaking 5
- Delivers correct information --
- Answers questions asked, not evasive 5
- Seeks clarification of ambiguous question or statement --
- Maintains command of the room 5
- Properly associates business/account questions to SA for resolution --
- Understands when to say 'AWS may not be a good fit for ...' 5
- Starts meeting on time --
- Appropriately defers questions to future slides, when appropriate --
- Ends meeting on time 5

Review Score 3.07

4. TRACKS NEW HIRE PROGRESS AND ENGAGEMENT

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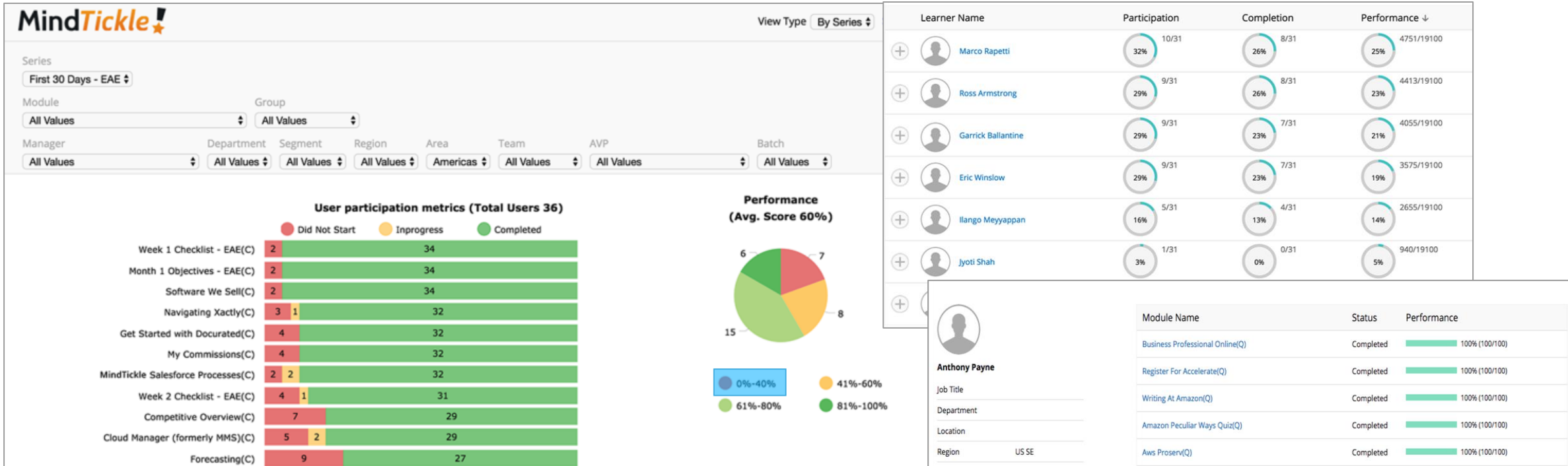
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ANALYTICS

IDEAL VS REAL

- Data driven progress tracking of new hire progression
- Reporting with multiple views – Training, Enablement, and Sales Leadership
- Reporting by region, role, etc.



5. MEASURE AGAINST IDEAL REP PROFILE AND BUSINESS METRICS

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ANALYTICS

IDEAL VS REAL

- Measure rep readiness against the ideal profile/cometency model



5. MEASURE AGAINST IDEAL REP PROFILE AND BUSINESS METRICS

STRUCTURED

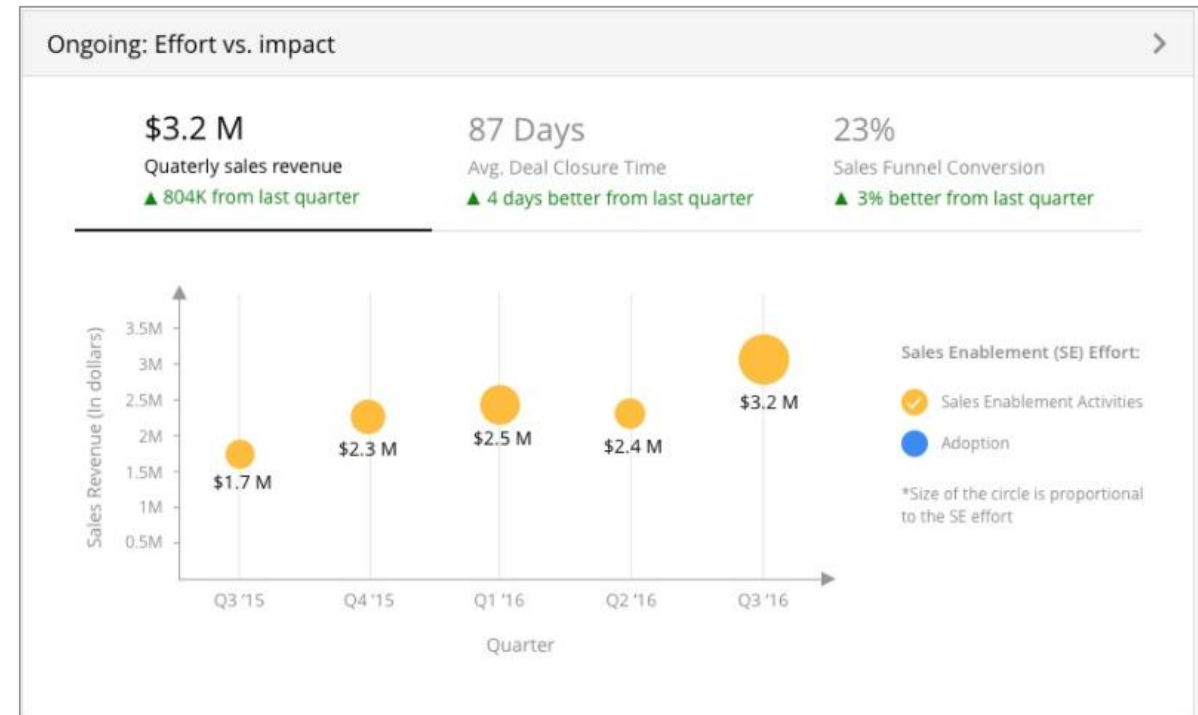
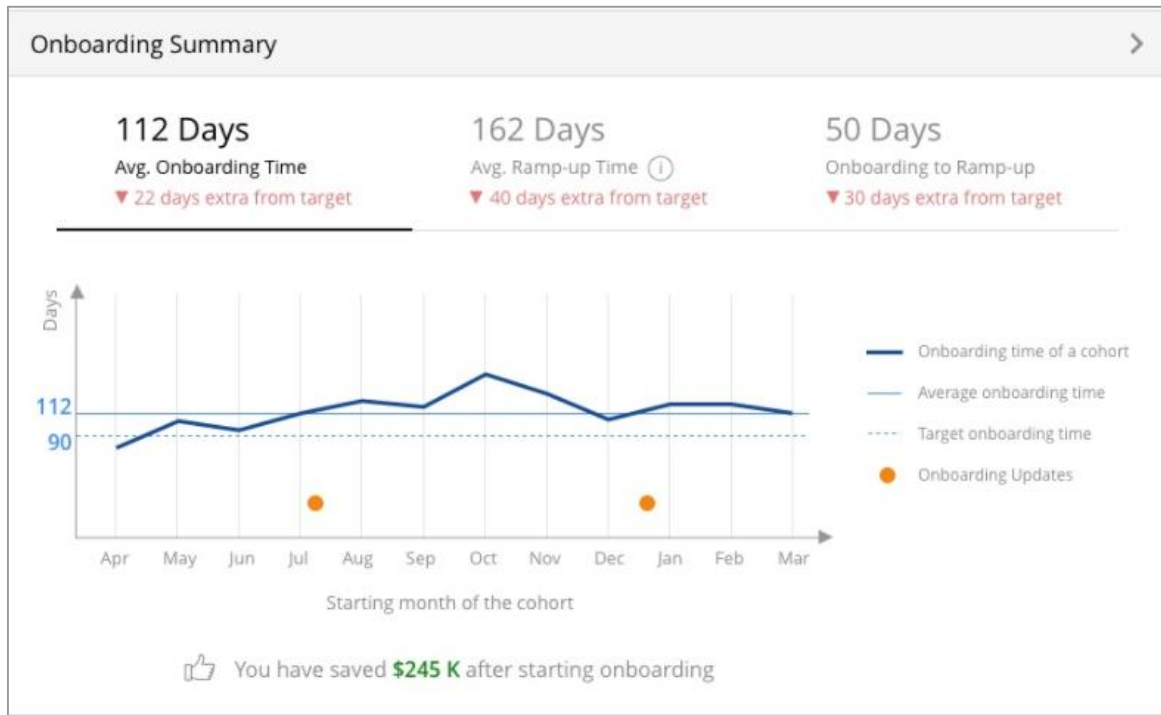
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INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

- Correlate with KPIs e.g. pipeline at 180 days, #PresidentClub < 12/18/24 months, revenue from <24 months, 1 year attrition rate



KEY TAKEAWAYS

1. A well-structured milestone based approach that is personalized for the sales rep's needs achieves best results
2. Investing into the right technology for delivery, tracking and administration makes onboarding scale
3. Blend knowledge with experiential learning activities
4. Follow up with recall and reinforcement activities
5. Map onboarding outcomes to business results - leading indicators (e.g. pipeline) and lagging indicators (e.g. revenue, quota attainment)

Questions?

MindTickle!

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Proven high adoption. Trusted as the strategic sales enablement partner by companies, like AppDynamics, CrowdStrike, MongoDB, Nutanix, Qualtrics, and many more.

Call us on 1(800) 231 5578 or email info@mindtickle.com to set up an appointment.

Schedule a call
with us for a deeper dive
into Sales Onboarding.

Thank you!

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for more tips and best practices