SALES ONBOARDING

ACCELERATING NEW HIRE PRODUCTIVITY

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Agenda

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

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.

Meet the Speakers

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.

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Meet the Speakers

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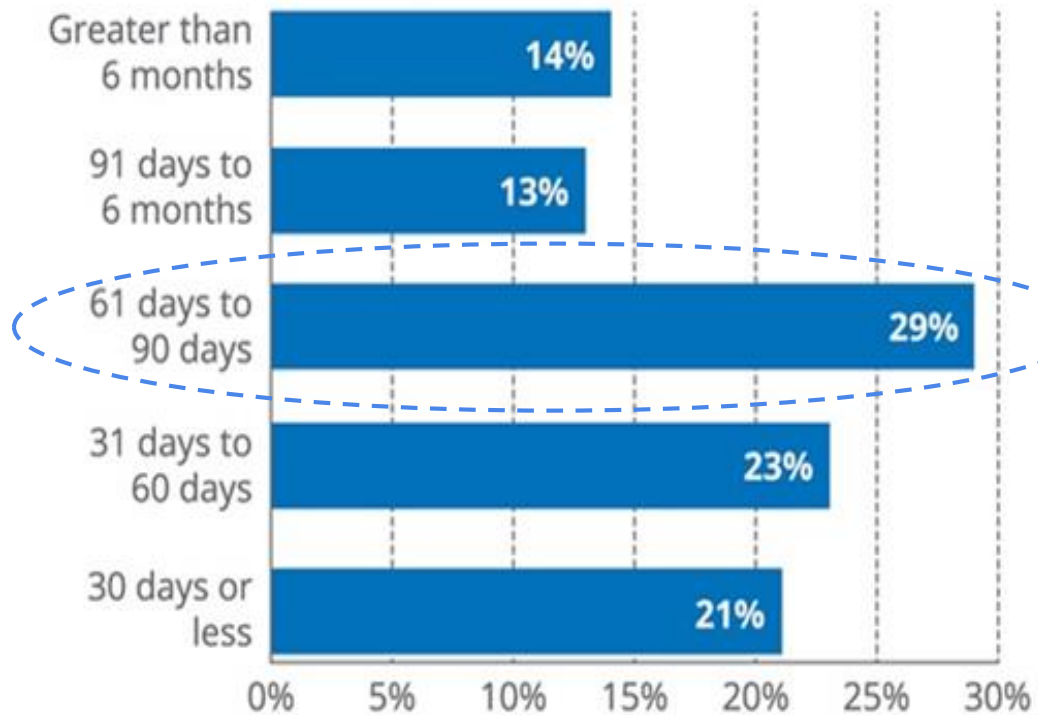
We will be taking audience questions at the end of the speaker presentations.

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

Greater than 6 months	14%
91 days to 6 months	13%
61 days to 90 days	29%
31 days to 60 days	23%
30 days or less	21%

Sales Rep Readiness for Customer Engagement

When their managers say they are ready	44%
New hires engage buyers from day one	28%
Upon completion of specific coursework	11%
Upon completion of an on-site "boot camp"	11%
Other	4%
Upon a formal assessment or certification	3%

Source: Sirius Decisions 2016 survey

Time-to-Productivity Measurement for New Sales Hires

Time to first deal	25%
We don't have a time-to-productivity measurement	23%
Quota attainment	22%
Pipeline generation	11%
List of sales activity expectations (first calls, presentations, etc.)	11%
Other	5%
Training courses/workshop assessments	3%
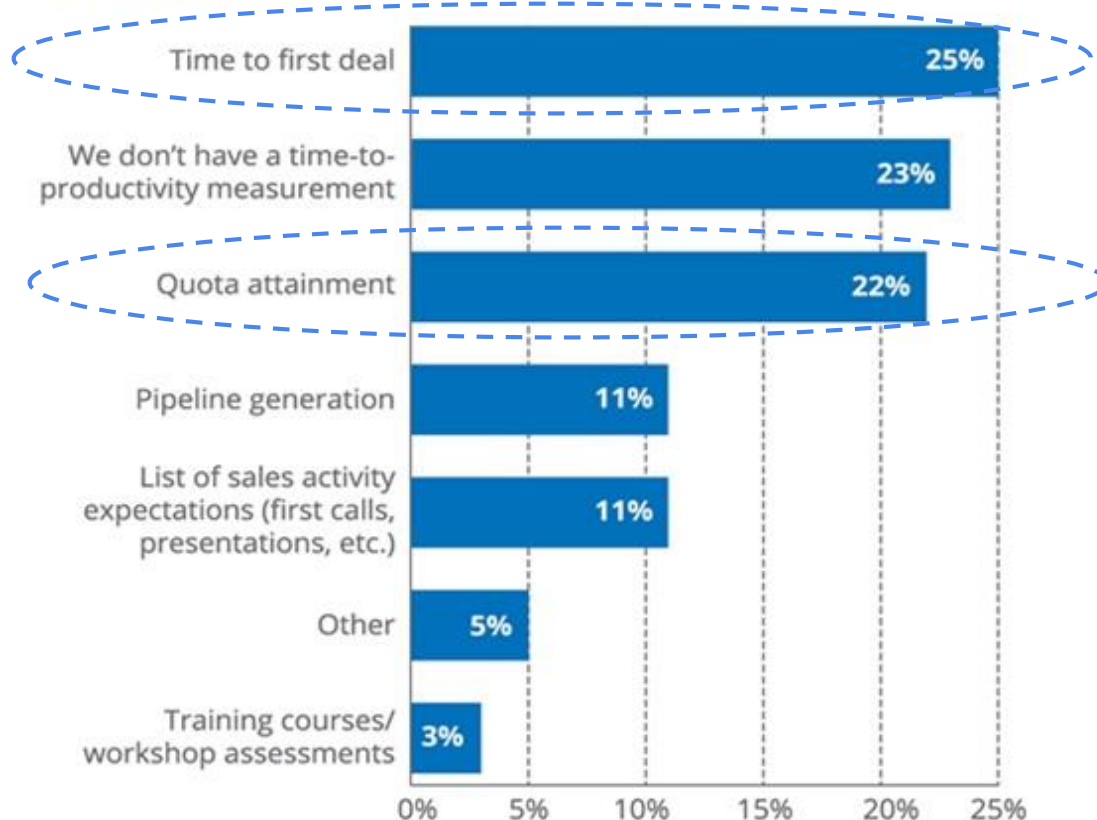
Key Takeaways

#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

74%
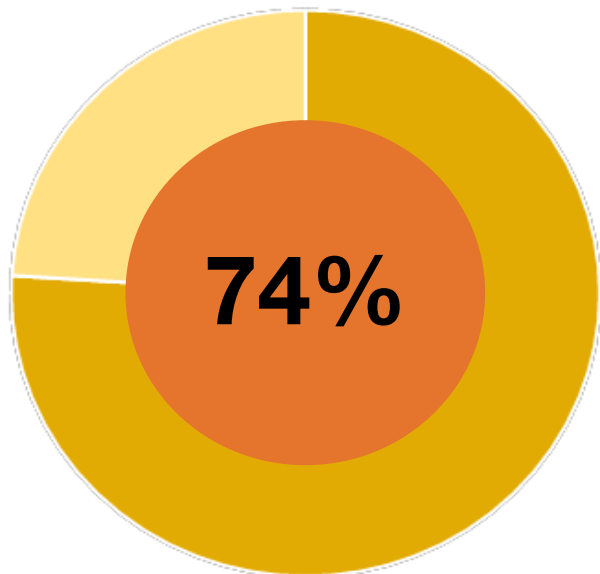
Companies have a formal Sales Onboarding Program

60%
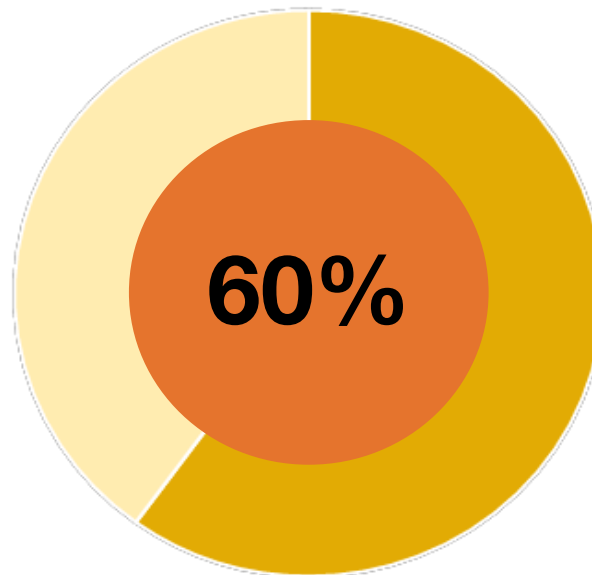
Faster ramp up of sales hires who go through a structured Sales Onboarding Process

2X
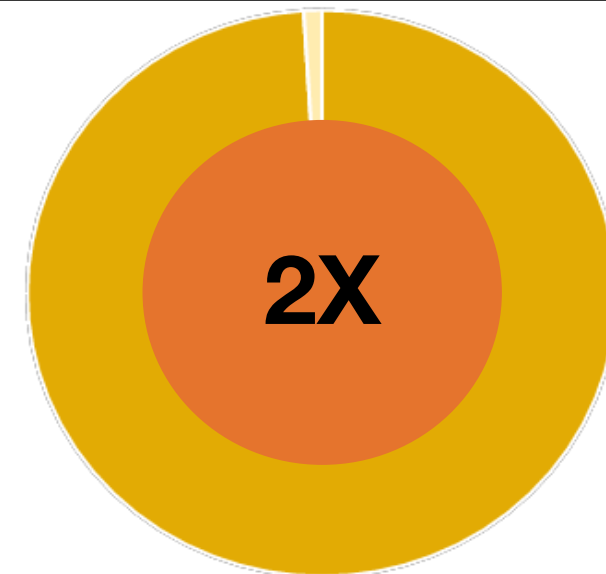
More topline revenue per rep earned by companies with an Agile and Structured Onboarding Process

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

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

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The Big Picture

SALES ONBOARDING AT CROWDSTRIKE

IS

● **PERSONALIZED**

SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized
- **SCALABLE**

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SALES ONBOARDING AT CROWDSTRIKE
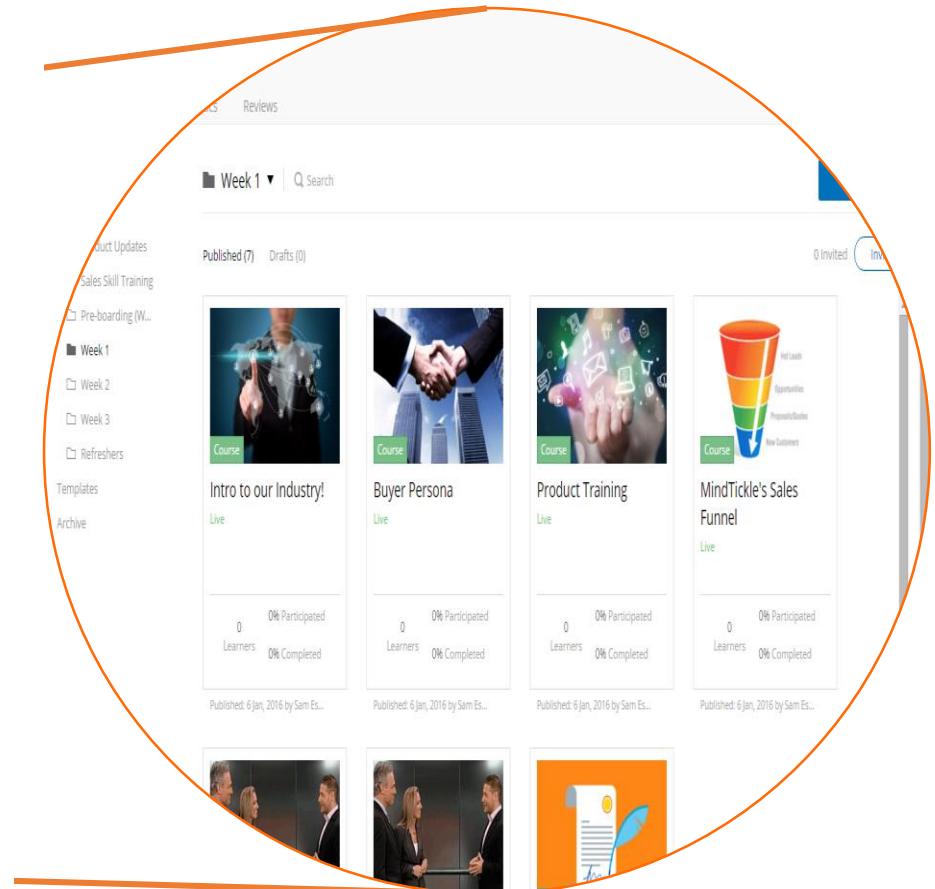
IS

- 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:
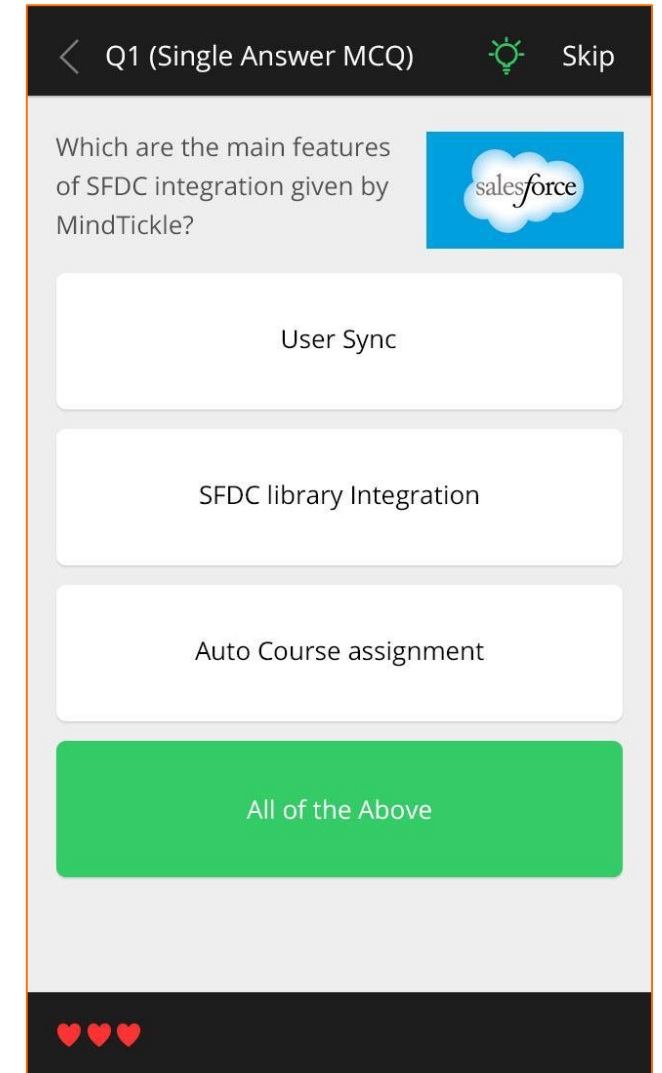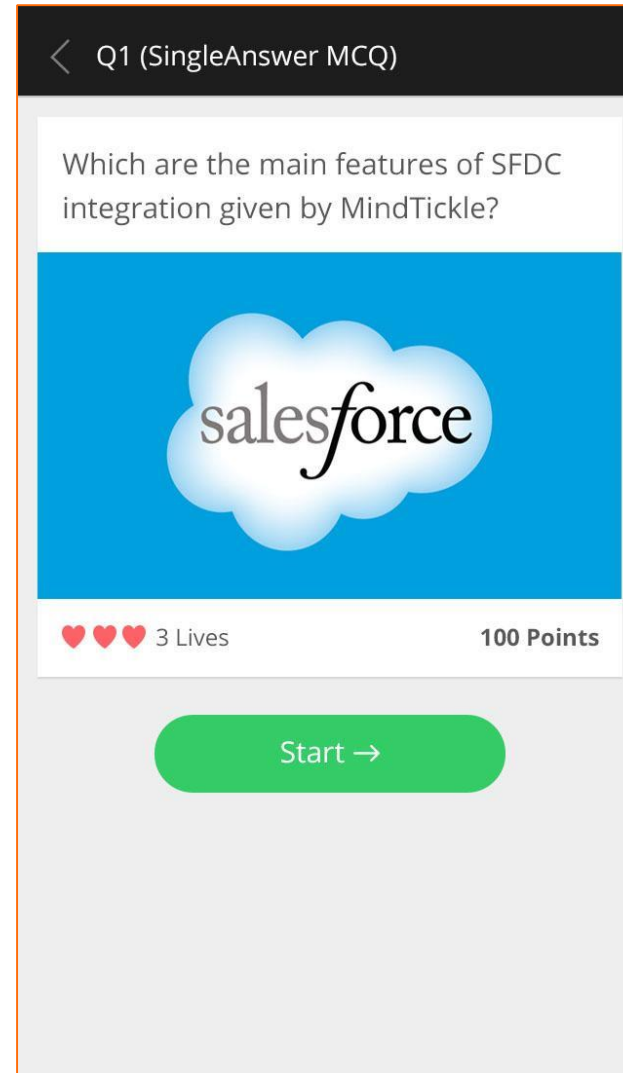Knowledge Clarity Confidence Enthusiasm

● Start recording

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SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized

- Scalable

- Structured & milestone based

- Comprehensive with blended learning & activities

- **INCLUSIVE OF RECALL & REINFORCEMENT**
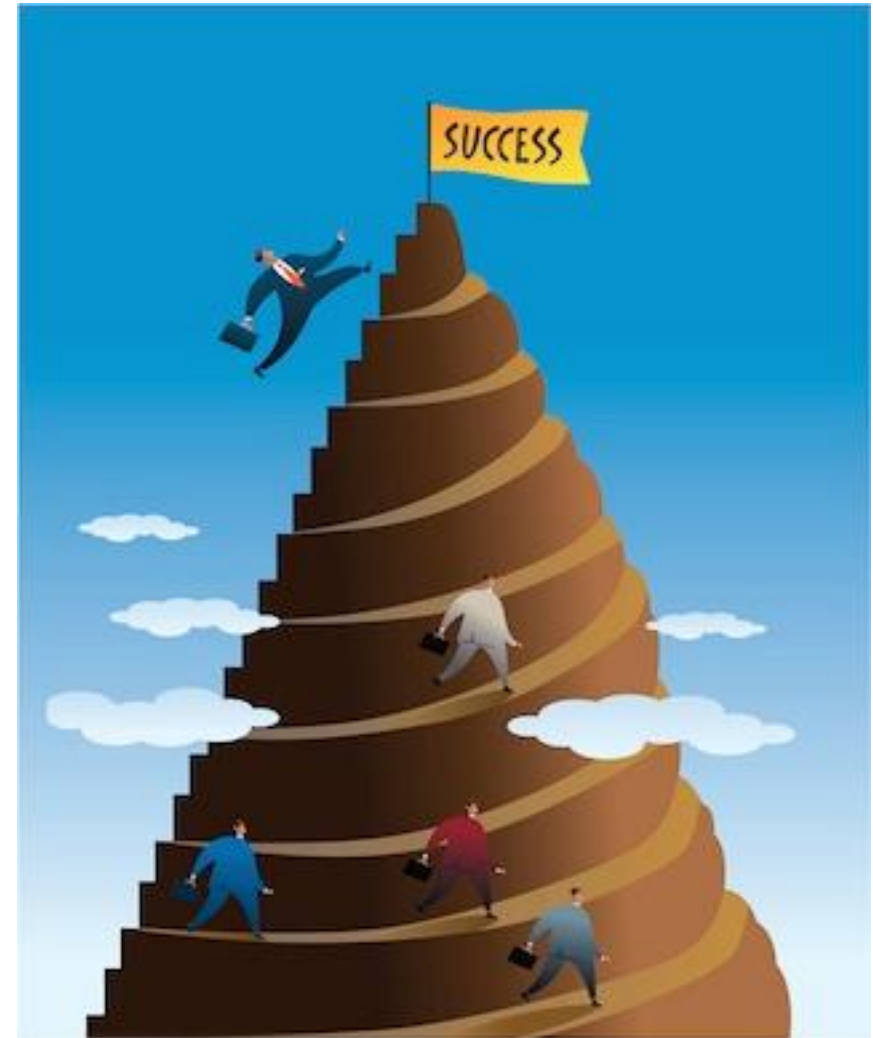
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IS

- Personalized

- Scalable

- Structured & milestone based

- Comprehensive with blended learning & activities

- Inclusive of recall & reinforcement

- **ALIGNED TO REAL WORLD SELLING**

● Caters to sales reps' natural competitive tendencies

● Aids bi-directional feedback for improved coaching

● Provides real-time progress to managers

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 on boarding / 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

Best Practice Sales Onboarding

1. Structured milestone driven approach

2. Includes experiential learning

3. Incorporates managers-driven coaching

4. Tracks new hire progress and engagement

5. Defines ideal new hire profile & measures the new hires against it

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?

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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.

Sales Enablement Platform

Learning Board · Content Files · Reviews 1

▼ My Board
- Pre-boarding (Week 0 -1)
- Week 2
- Week 3
- Week 4
- Sales Scenarios
- Success Stories
- Product Updates
- Competitive Insights
- Refreshers

▶ Public Series

Pre-boarding (Week 0 -1) · Completion Status - All ˅ · Content Type - All ˅ · 🔍 Search

Course — Welcome to MindTickle
Due on Dec 19, 09:45 PM
14% Complete

Course — Sales Skill Training
14% Complete

Course — Customer Stories
START →

- Week 2   - Week 1

Date of Joining

STRUCTURED | EXPERIENTIAL | INVOLVE MANAGERS | ANALYTICS | IDEAL VS REAL

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

- Week 2 | - Week 1

Date of Joining

STRUCTURED   EXPERIENTIAL   INVOLVE MANAGERS   ANALYTICS   IDEAL VS REAL

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

Week 3
Pre Boot camp

- Week 2   - Week 1   Week 1   Week 2
Pre Boot camp

Date of Joining
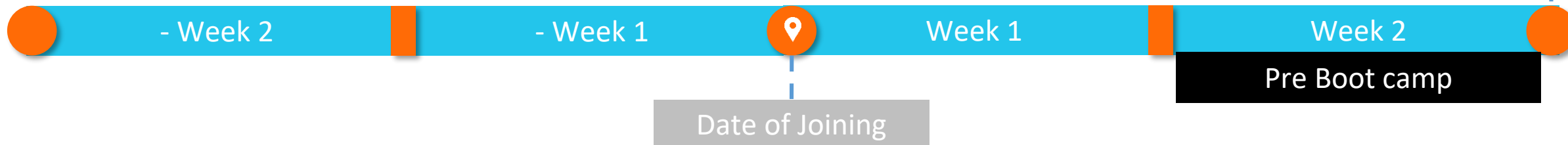
1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED   EXPERIENTIAL   INVOLVE MANAGERS   ANALYTICS   IDEAL VS REAL

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

Week 4	Week 3
Boot camp	Pre Boot camp

- Week 2	- Week 1	Week 1	Week 2

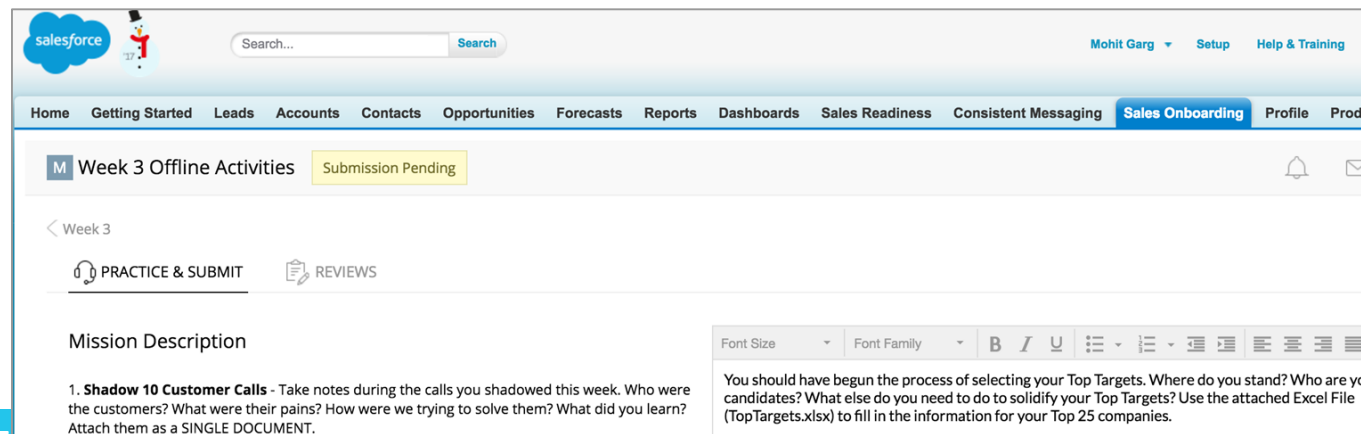Date of Joining

STRUCTURED EXPERIENTIAL INVOLVE MANAGERS 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

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

STRUCTURED | EXPERIENTIAL | INVOLVE MANAGERS | 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

STRUCTURED   **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

Visual journey for a quick course overview

Foster healthy competition with activity updates from other group members

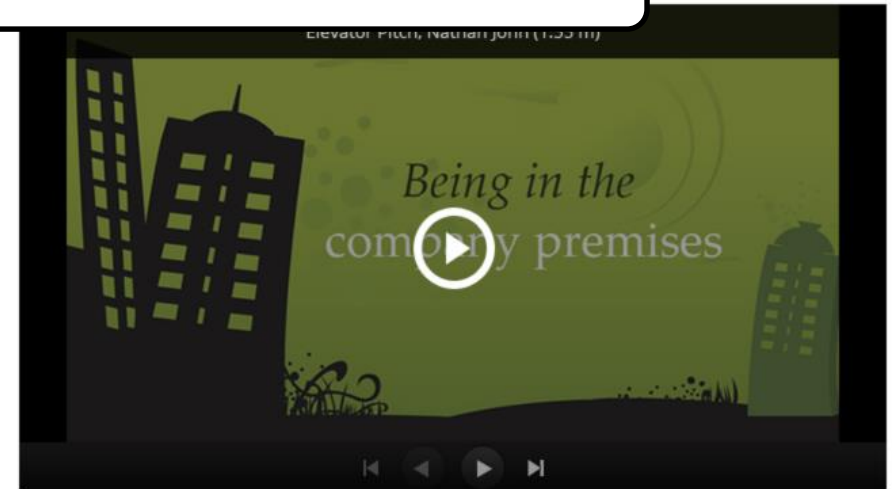**STRUCTURED** | **EXPERIENTIAL** | **INVOLVE MANAGERS** | **ANALYTICS** | **IDEAL VS REAL**

- 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.

Elevator Pitch, Nathan John (1.33 m)

Being in the company premises

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

STRUCTURED	EXPERIENTIAL	**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

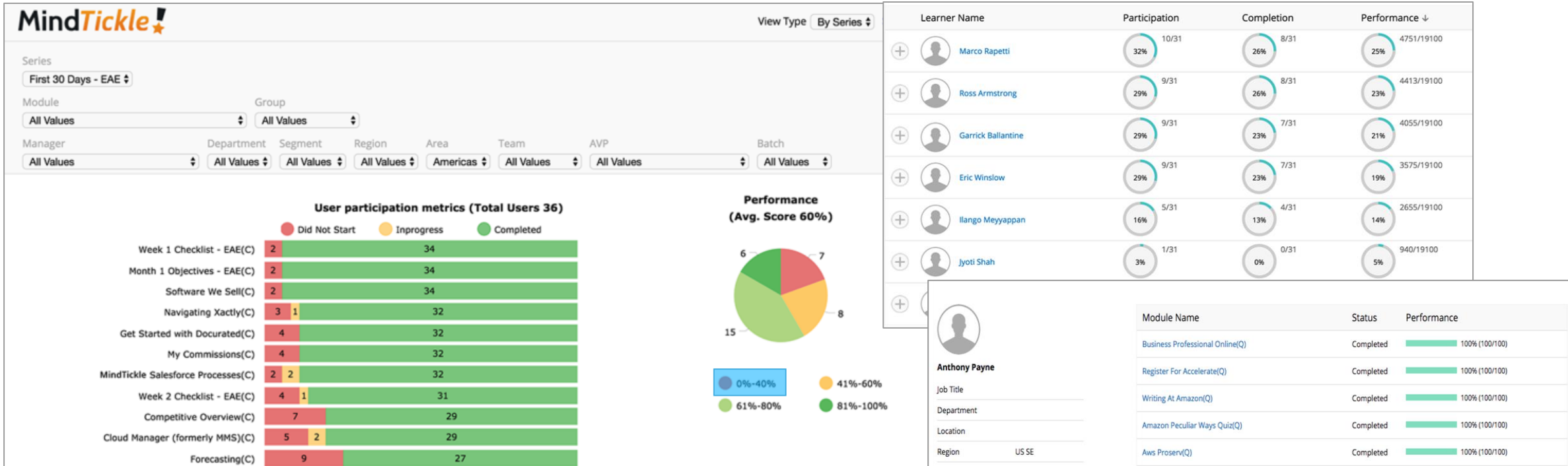# 4. TRACKS NEW HIRE PROGRESS AND ENGAGEMENT

| STRUCTURED | EXPERIENTIAL | INVOLVE MANAGERS | 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.

STRUCTURED	EXPERIENTIAL	INVOLVE MANAGERS	ANALYTICS	IDEAL VS REAL

- Measure rep readiness against the ideal profile/cometency model

Sales Manager

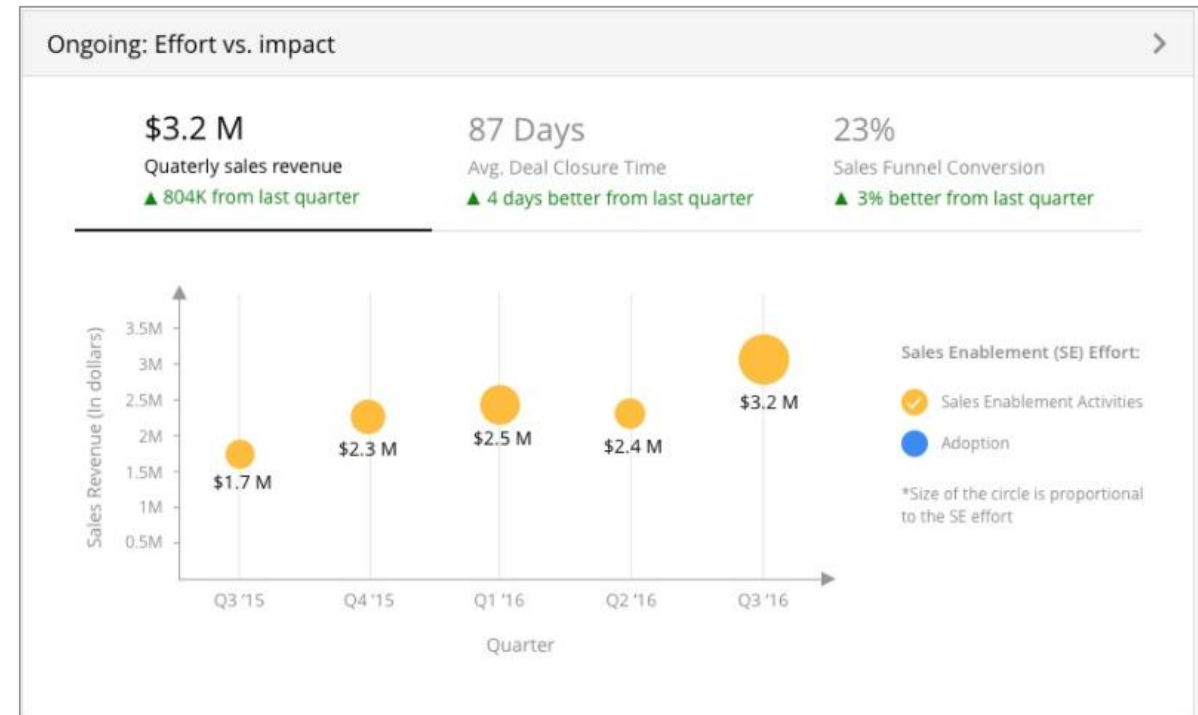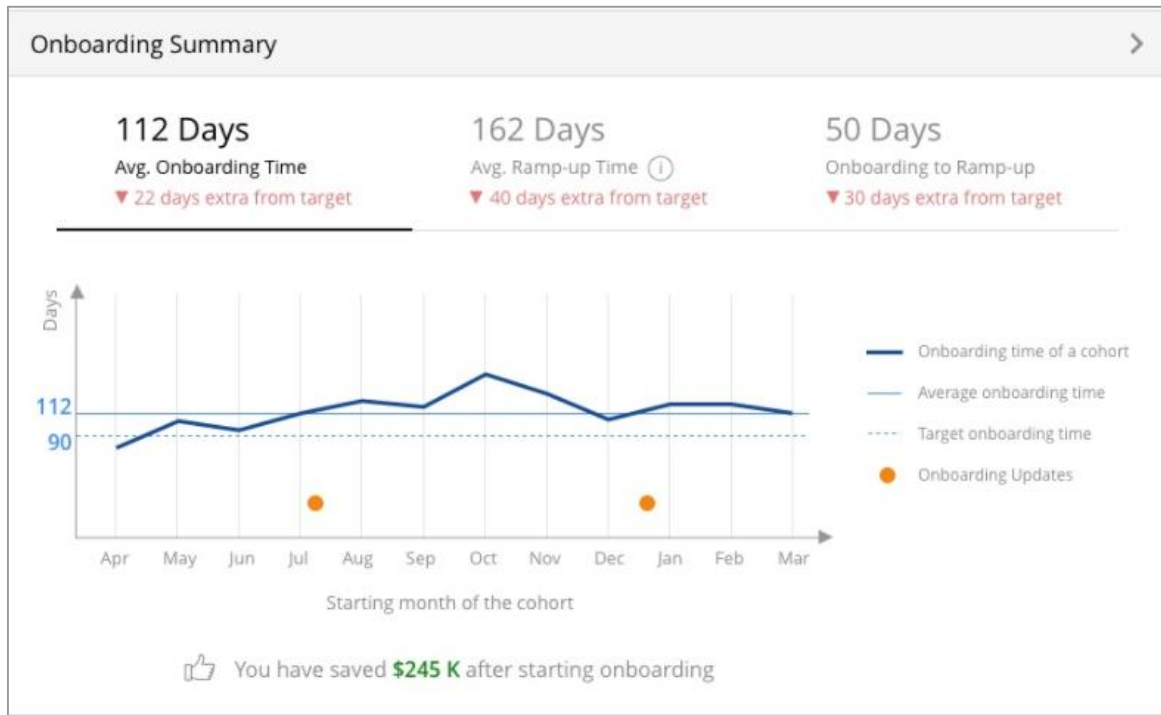New Reps

Competency model for sales team

STRUCTURED | EXPERIENTIAL | 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?

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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!

Follow us on Twitter at @mindtickle
for more tips and best practices