

SellingPOWER

Improve Onboarding through Documentation

Renee Houston-Zemanksi

Sitting in a barren cubicle, John looks at his office phone. He's already skimmed through his training manual twice and is now just sitting, waiting for his turn to go on a sales call...does this sound like your onboarding process?

Typically, new sales hires are provided training, go along on sales calls, and basically, learn through osmosis, says Jeremy Miller, a partner with LEAPJob, a Toronto-based sales recruiting firm that specializes in recruiting business-to-business sales professionals. "The problem is that it takes a long time to learn through osmosis," he says. "You can see it taking months because they have to learn all those stories, history, and lore just to be effective."

That's why Miller says it's important to move from an oral history to a written history. He recommends that companies start documenting stories such as the processes by which customers buy from you, and your options, so you can create a conscientious learning process. "By documenting all of this, you can instill all that legacy history that is held in the senior reps' brains very quickly," he says. "You can reduce your onboarding time by 50 percent."

To document history, Miller recommends assigning someone – perhaps a sales manager or hiring a consultant – to interview senior salespeople and collect stories. They also should write down how current customers buy and add it to a message library. For example, when customers pose questions, have reps record those questions and provide clear answers for them. Miller suggests tracking the customer profiles by dividing your customers based on size or what type of product they buy, for example. "The message library would include the profile, trigger event (the issue), and the story, which is how you solve the problem or what their options are," he says. "Make this message library part of the onboarding training curriculum where you create role-plays and examples so that people can learn much more efficiently."

Miller says that another advantage of a written history is that it helps when a company wants to scale its organization quickly. For example, if your company moves from a local structure to a regional structure with field offices, you can take the history and knowledge from the home office and implant it into the new offices. This way you can ramp up new offices and new hires very quickly, he says. The other key advantage is brand consistency, says Miller. "Now that everyone is singing from the same song sheet, no matter what salesperson you are talking to, you're going to hear the same story," he says.

Spendmap.com, an e-purchasing software company, is a prime example of how beneficial a message library can be for companies who want to get new employees up-to-speed quickly.

"When Spendmap hired new salespeople, they faced a challenge of a ramp-up time of more than

a year just because the new reps would not only have to learn the new technology, but also customer buying habits and how to do a demo among other things," explains Miller. "It was a long arduous task that was not only taking a lot of executive time, it also was limiting their ability to skill a sales force quickly. Then they started documenting how the customers buy, outlining their options, and created a message library. Now reps can pull similar customer examples from this message library to show prospects how their software can help. They can deliver a very detail-oriented case study within the first three months of employment. Previously reps would have to learn that information anecdotally."

Case in point: Spendmap hired two new reps and they were already up-to-speed and at full quota capacity within four months.

"It's a simple concept – document your history and what makes it remarkable, and document your customers' stories so that you can make it accessible to your salespeople sooner," says Miller.