

Designing a Highly Effective Sales Onboarding Program

The Craft, Deliver, and Enable framework will help you build a highly effective sales onboarding program for your organization.

A robust onboarding process not only trains new hires, but also embeds essential habits into their routine. Make it *everboarding*—ongoing learning—and you'll ensure continuous improvement in their sales performance.

Use this checklist to guide you through the process.

Craft the Onboarding: Vision, Metrics, and Strategy

CALCULATE THE COST OF SELLER TURNOVER

- Estimate the financial implications of seller turnover
- Use the calculation to inform investment levels for onboarding improvements

DEVELOP THE ONBOARDING STRATEGY

- Engage key stakeholders to define the vision and outcomes for the onboarding process
- Establish performance metrics aligned with intended goals and outcomes
 - Identify lead measures (indicators for being on the right path)
 - Identify lag measures (target desired results)
 - Complete the [Sales Onboarding Lead & Lag Measures Worksheet](#)
- Develop a clear roadmap and set expectations for all parties involved
- Focus on key drivers of effective onboarding:
 - Training on the company's sales process and methodology is strong
 - New sales hires feel supported during the onboarding process
 - Teamwork and collaboration are emphasized
 - Coaching and support are prioritized

CREATE AN ONBOARDING BLUEPRINT

- Identify the current state of the onboarding process
- Identify and visualize the desired future state or "New Reality"
- Complete the [Sales Onboarding Blueprint Template](#)

USE A SKILLS AND COMPETENCY FRAMEWORK

- Determine the essential knowledge, skills, and behaviors new hires need to succeed by using a model like [The Top-Performing Seller](#) and [The Top-Performing Sales Manager](#), or whichever model your organization uses
- Develop related practical tools and resources like checklists, planners, worksheets, playbooks, and guides

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TAILOR LEARNING JOURNEYS

- Customize the onboarding plan to cater to various sales roles
- Target training and materials based on roles, product/service knowledge, industry insights, geographical locations, and other relevant parameters
- Provide access to a scalable and flexible [sales learning resource library](#)
- Enable continuous learning through modules, videos, tools, and other assets that can be customized, updated, and reused
- Implement *everboarding*—ongoing learning—to facilitate skill development beyond initial onboarding

MINIMIZE TIME OUT OF THE FIELD

Support an [effective self-study approach](#) with the following actions:

- Run a cohort kickoff session
- Release weekly learning modules, including microlearning videos, tips, tools, and knowledge checks
- Have participants complete practical assignments for real sales scenarios
- Promote peer review by pairing each participant with an accountability partner for feedback and motivation
- Assign experienced coaches to deliver coaching in small groups to address questions, provide guidance, review assignments, and facilitate best-practices discussions

Deliver Highly Effective Onboarding

DELIVER STRUCTURED ONBOARDING WITH ACCOUNTABILITY

- Set clear expectations and communicate short- and long-term goals for new hires to track their progress
- Ensure action plans are challenging yet achievable, fostering motivation and engagement

USE MODERN TRAINING TECHNIQUES

- Hybrid delivery
- Flipped classrooms
- Simulations and role plays
- Knowledge checks and quizzes
- Practical activities and exercises
- Feedback
- Shadowing other sellers or team members

FOSTER COLLABORATION AND TEAMWORK

- Encourage new hires to interact with their accountability partners, peers, sales managers, coaches, and other team members
- Devote time during 1-on-1 meetings and team meetings to encourage the sharing of challenges, accomplishments, and best practices

ENSURE AVAILABILITY OF RESOURCES AND SUPPORT

- Make sure new hires have access to all essential tools, technologies, and resources necessary when and where needed
- Provide reinforcement and multiple exposures to the most important topics over time
- Deliver a regular ongoing schedule of coaching to support new hires and hold them accountable to their action plans

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Enable New Hires to Succeed

PREPARE THE SALES MANAGERS

- Train sales managers on the same topics as sellers
- Train and coach sales managers to improve their coaching abilities so they're equipped to coach, motivate, and guide new hires toward success
- Equip sales managers to deliver productivity and execution coaching
- Empower sales managers to roll out 90-day sales challenges to get sellers immediately focused on the right skills and activities to get results

EMBED THE SALES METHOD INTO THE ORGANIZATION

- Provide strong training on the organization's sales process and methodology
- Ensure that coaching from managers aligns with the organization's sales method for consistency and effectiveness
- Make a comprehensive sales resource library available to the sales team for ongoing learning and performance support

MEASURE THE EFFECTIVENESS AND IMPACT OF THE ONBOARDING PROGRAM

- Use the earlier identified key performance indicators (KPIs) to evaluate the success of the onboarding program, including metrics like learner engagement, attendance, and satisfaction
- Track both the earlier identified lead indicators (like outbound activity and meetings set) and lag indicators (like revenue and time to productivity) to assess overall impact

MAKE CONTINUOUS IMPROVEMENT A PRIORITY

- Gather feedback from new hires, the existing team, and sales managers on the onboarding program
- Regularly update and modify the onboarding process based on feedback and evolving business needs