Sales Onboarding
Lead & Lag Measures

The success of an onboarding program is gauged by specific performance metrics tied to the goals or outcomes you aim to achieve. As such, there's no one-size-fits-all metric; it varies from one organization to another.

Start by identifying goals and outcomes, then pinpoint the business (lag) metrics that reflect the end results you're targeting. Finally, identify the indicator (lead) metrics that act as signposts, showing you're on the right path. This should be done both for your onboarding overall and when defining metrics for individual sales roles. We've included a menu of sample measures below for you to reference, but this list isn't exhaustive and you'll likely have unique measures related to your business and industry that aren't included here.

Lead Measures

INDICATOR METRICS THAT ACT AS SIGNPOSTS, SHOWING YOU'RE ON THE RIGHT PATH.

1. Sales skill progress / certification
2. Sales rep activity (e.g., outbound activity, meetings)
3. Presentations delivered
4. Demos conducted
5. Sales method and process adoption
6. Lead conversion rate
7. Customer feedback
8. Product knowledge
9. Sales tool adoption
10. Sales coaching effectiveness
11. % completion of self-study modules
12. % participation in training reinforcement activities
13. # account plans completed
14. # of observed sales calls
15. # of coaching sessions

Lag Measures

BUSINESS METRICS THAT REFLECT THE END RESULTS YOU'RE TARGETING.

1. Sales revenue
2. % quota attainment
3. % attainment of sales goal
4. Customer acquisition cost (CAC)
5. Average revenue per seller
6. Length of sales cycle
7. Customer retention / churn rate
8. Lead to close ratio
9. Net Promoter Score (NPS)
10. % account growth
11. % sales lost to no decision
12. Average sale / order value
13. Win rate on proposed business
14. Sales force turnover rate
15. Time to productivity / new hire ramp

Instructions

1. Complete the Sales Onboarding Blueprint Template
2. Add your New Reality points into the Goal & Objective boxes below
3. Using the menu on the previous page to generate ideas, identify the business (lag) metrics that reflect the end results you're targeting.
4. Using the menu on the previous page to generate ideas, identify the indicator (lead) metrics that will show you that you're on the path to achieving them.

GOALS & OBJECTIVES	LEAD MEASURES	LAG MEASURES

Note: Use this worksheet as a tool. You may end up with fewer (or more) metrics for each of your goals and objectives.