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2019

Onboarding & Managing New Sales Professionals

Presented by

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Core Topics of Discussion

CONNECTWISE & SERVICE LEADERSHIP INDEX BENCHMARK

SETTING REASONABLE EXPECTATIONS UP FRONT

HOW TO HELP THE SALES PROFESSIONAL HOLD THEMSELVES ACCOUNTABLE

WHAT TO MEASURE *BEFORE* NEW REVENUE IS ATTAINED

KEY MILESTONES & IMPLEMENTATION OF PLAN FOR THE FIRST YEAR OF EMPLOYMENT

During Our
Sales and Marketing Session Today

- ConnectWise is deeply vested in your business success, which is a key reason I'm here.
- Many of you have in hand, the Service Leadership Index® benchmark that ConnectWise has sponsored for you.
- What we're going to talk about today, will help you further accelerate your financial performance.
- Delivering the right lead flow and pipeline of closed deals drives your stock value. Take a look at your FDR or SLI benchmark and keep in mind how you're performing today, as we talk.

Value of Building an Onboarding Plan

- Set Clear Expectations & Milestones
- You forget how much YOU know & your new sales person needs to know
- Saves you TIME when you hire a new sales professional
- Provides early visibility regarding how your new employee can follow a plan


HOW ARE YOU DOING ON YOUR UNSPOKEN OBJECTIVES?
MY WHAT?
Dilbert.com DilbertCartoonist@gmail.com
I'M REFERRING TO THE GOALS I HAVE IN MY MIND THAT I'VE NEVER MENTIONED.
5-29-12 ©2012 Scott Adams, Inc. /Dist. by Universal Uclick
HOW ARE THOSE GOING?
I'M TOTALLY NAILING THEM.

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Set Realistic Expectations

- An Onboarding Plan helps you set expectations during the hiring process
- Draft (Jr) vs. Free Agent (Sr) Reps will have different goals/timelines
- Revenue Production Takes Time, a Plan helps identify success (or not) before revenue comes – each milestone objective affords a go/no-go opportunity
- Challenges your Sales Professional to achieve goals along the way and hold THEMSELVES accountable

Key Variables for Outside Sales Onboarding

- Define the First 30, 60, and 90 Day Milestone expectations
- Create the First YEAR plan broken down by quarter, and allow for some flexibility over time to assess & adjust based on progress
- Build an hour by hour schedule for the first 5 to 10 business days
- Provide a LONG list of competencies, training, and skills your sales professional needs to know over the first year

Example Milestones

- **First Quarter (Q1):**
- Weekly One-on-One's with sales manager & weekly team meetings.

- **First 30 Days:**
  - Be able to Tell the Mytech Story – Share with Nate for alignment
  - Completion of Initial Mytech Sales Tools Training (ConnectWise, Quosal/Sell, HIPAA Health Center, KnowB4, & MytechU)
  - Completion of Initial Vendor Training – Dell & SonicWall
  - Completion of Shadow/Position Sessions – See list below

Example Milestones

- **60 Day Milestones:**
- Proficient at Holding First Meetings
- Product Training and Best Practices Value Map
- Be able to Explain the Management Programs
- Activity, Opportunity & Ticket Accountability
- Develop Competency in Sales Process as Opportunities Progress Through them
- Present Go To Market Plan through end of 2019 to Team
- Observe at least ONE Quarterly Business Review

- **90 Day Milestones:**
- Sales Pipeline Building
- Set and perform at least 6 First Meetings with Prospects
- Identified Association Engagement
- Develop Competency in Sales Process as Opportunities Progress Through them
- Observe any New Client Engagements (from other reps) if schedule allows

Shadow Sessions

- **Provide a list of individual people and/or roles the Sales Professional should shadow on your team:**

Example Roles:

- Process, Marketing, Service Desk Management, Culture, Sales Engineering, Shared Technical Services (Network Operations Center), Project Management, Client Onboarding, Depot, Help Desk Technician, Finance, Procurement, etc.

Shadow Sessions (first thirty days):

- The goal of these sessions is to help the rep understand the different roles in the organization. This will help the rep navigate the different requests that they will receive from prospects and clients, as well as to be able to describe the nuances of what you do.

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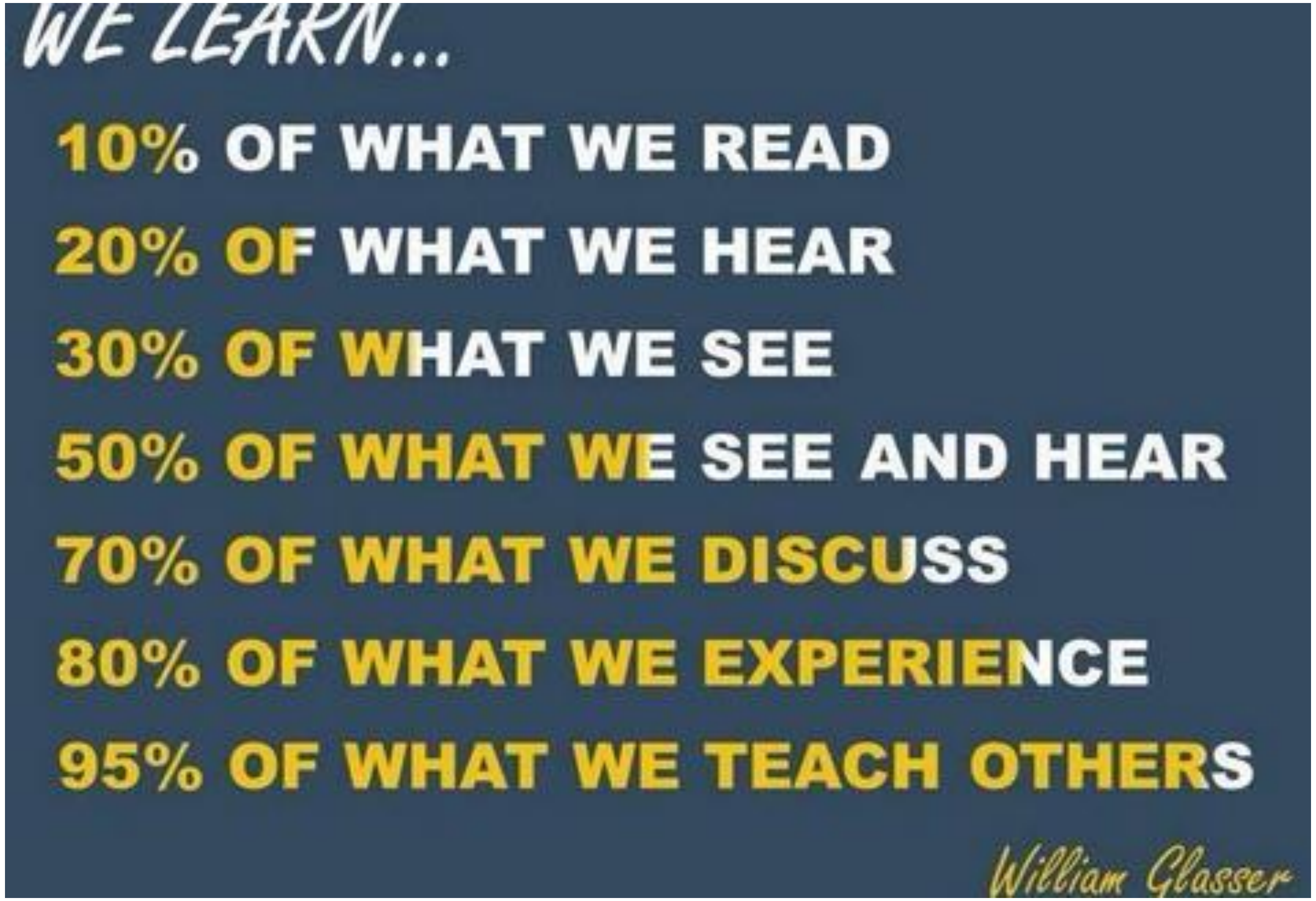
Learn, Do, Teach & Repeat

- **Learn, Do, Teach & Repeat**
- The onboarding plan should include – Learn, Do, Teach:
    - Your Training Theory (Learn)
    - Their Execution (Do)
    - They need to explain back to you or other team members for validation (Teach)
- Expect the need for repetition with incremental learning (if not, red flag)
- Build milestones that linearly build competency/autonomy through your sales process as your new hire is moving prospects through the sales process



Develop Mentorship

- **Be intentional about Developing Mentorship**
- IF possible, identify another person on your team to mentor, and be a resource
- You cannot be the ONLY person to help your new (and future) hire(s)
- Finding a good mentor (someone who enjoys and is good at mentoring) COULD be your sales manager in the future

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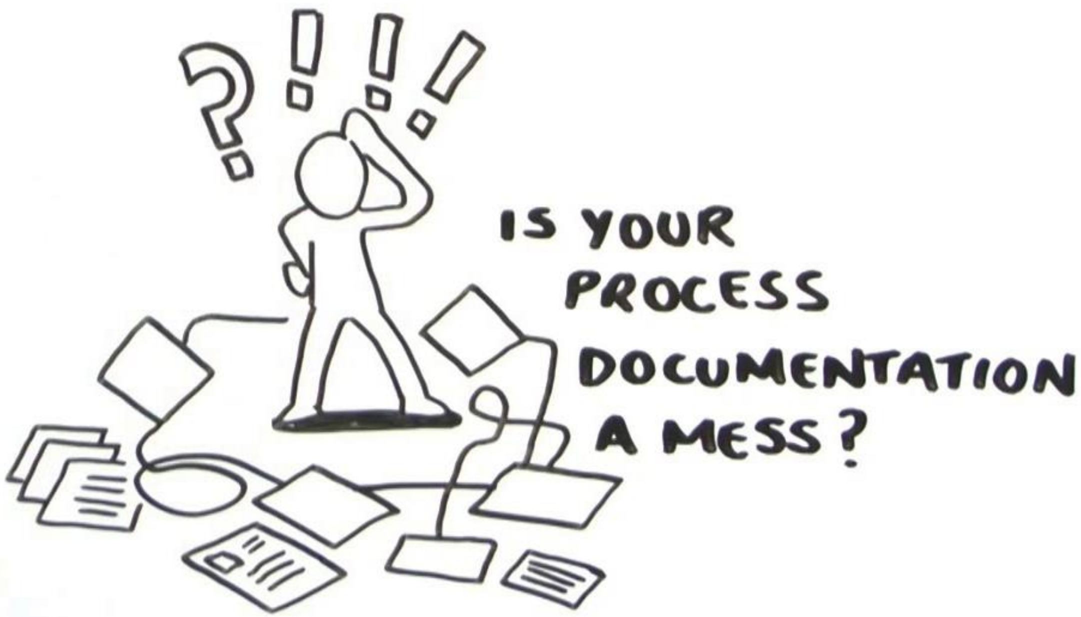

Create & Improve Documentation

- Incrementally build the additional details/documentation you need – build/refine as you go
- Perhaps you do not have much documentation for your new hire/team
- Perhaps you want to move towards SharePoint for authoritative documents
- Perhaps you have had file/folder sprawl and your new hire/team finds it difficult to locate key reference documents

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Summary - Implementation of Plan

- The implementation plan should be woven into your regular Supervisor-to-Employee weekly one-on-one
- Follow through on YOUR commitments & make time to go shoulder to shoulder with your new hire
- Use Microsoft Teams to share/edit the onboarding document & plan – could also be shared with mentor too
- Schedule out your 30, 60, 90 day and Quarterly Milestone Check-ins – these are CRITICAL accountability checks

Supporting Documents & Templates

To help you ‘Take Your Next Step’ I have some supporting documents & templates that may be helpful in your Sales Onboarding Journey:

- Sample onboarding milestone templates for outside sales and account management roles
- Sample First Meeting Objectives & Follow Up Tips
- Documents from my other three sales sessions on Hiring, Managing & Compensation Planning

If you would like to receive an email with a link to download one or all of these documents, just provide me your business card and I will follow up with a page link where you can download.

Don't Forget to Fill Out Your

SESSION SURVEY

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Thanks for Attending!

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