

# Better Sales Onboarding with Guided Selling



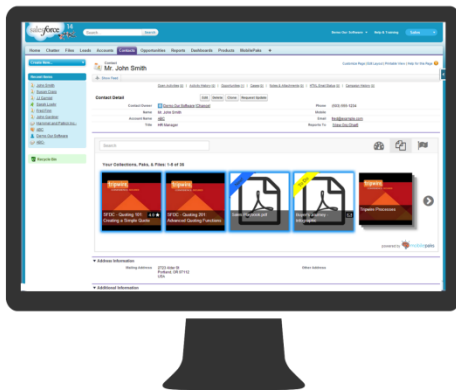
# Sales Onboarding with Guided Selling

Buyers are more sophisticated than ever, and sales reps need to adapt accordingly and move beyond pitching products. They have to be able to clearly articulate and quantify the value your solutions deliver in order to grow revenue—and that means an attendant growth in the learning curve for new reps. Adding Guided Selling technologies to a comprehensive sales onboarding program makes it easier to get reps up to speed quickly, especially as pressure mounts to save money and make reps fully productive in a shorter timeframe.

In this brief, we explain just what Guided Selling is, and share best practices for supporting your onboarding program with guided selling technology in three key program components: **Sales Assessment**, **Training** and **Tracking and Measurement**—with the ultimate aim to:

- Increase sales skill and product knowledge
- Help reps acclimate to their new company
- Increase revenue production

## What is Guided Selling?



SiriusDecisions coined the term Guided Selling in 2013 to describe an adaptive, intelligent system that uses a wide variety of contextual data to provide recommendations for each transaction. A Guided Selling system is able to perform a wide variety of tasks, such as configuring solutions, updating opportunity plans, and identifying potential roadblocks—all on the fly, in contrast to static sales solutions.

Most relevant to the topic at hand is Guided Selling's ability to automatically provide real-time content recommendations to sellers based on transactional data (e.g., prospect title, sales stage and transaction type), as well as track usage and engagement. Veelo' Guided Selling tool, for example, automatically recommends the most relevant reference materials and marketing collateral to sellers from

within the CRM and on any device, while managers can access a rich array of reports and usage analytics.

## Sales Assessment

Most organizations today support new sales hires with a 90 or 120 day onboarding plan, with sellers in the field as soon as day three. Although all new reps have to surpass a minimum threshold of sales competencies to be hired, sales enablement should assess each individual's skills and weaknesses in greater detail and tailor the reps' training and field support accordingly. Testing salespeople on their understanding of basic company-specific sales processes and tools, as well as sales skills and product/solution knowledge, will help you understand how to get them up to speed more quickly.



**TIP:** Guided Selling technology can capture assessment results by rep. If you are using a learning management system or other tools, then make sure to stream this data by user through an open API.

## Training

Most corporations opt for a blended learning approach to their programs—combining a small amount of classroom training with virtual learning sessions.

- **Structured/LMS.** If you employ a learning management system or host live in-person training sessions, limit their use to early orientation and structured training only. Information retention is a common problem of this early phase; salespeople retain on average only 10% of the material after the first week.

And let's be real: salespeople can't click through these modules fast enough. They'd rather be selling. Shift more of your resources to strengthening your virtual and field support programs. Topics appropriate for early structured training include a company overview, an explanation of the sales process within your organization and product/solution information. Each module should last no longer than 20 minutes and end with an assessment to ensure content mastery.



**TIP:** Shift a higher percentage of content training development from upfront structured in-person or web-based training to virtual coaching and field training for better results.

- **Live and Virtual Coaching.** Instructor/Manager lead training should be focused on the concept of “practical practice” with an emphasis on having real selling conversations, including qualifying, use of discovery questions, positioning, differentiation, and referencing key customers and proof points. Manager or peer mentor practice and evaluation boost learning retention and aid in new hire assimilation. Gamification is an additional tool that boosts engagement by allowing new reps to compete with onboarding classmates and the broader sales team as they become active in the field. Virtual training should include tools that allow reps to test their skills and knowledge, and dashboards for them to see their strengths and areas of development.



**TIP:** Based on the results of live and virtual coaching sessions, managers can assign and/or recommend Field and Guided Selling aids to help salespeople continue to learn and close remaining knowledge gaps.

- **Field/Guided Selling.** Learning is most powerful when you can immediately apply it, boosting retention to 60-90%. Guided Selling automatically recommends training bursts alongside reference aids in the CRM or sales portal, relevant to the salespersons’ need. Because recommendations are built on best practices (data from prior training components, what top performers do, as well as what the prospect is most interested in), Guided Selling applications can act as a virtual mentor.



**TIP:** Repetition and focused engagement refresh memory, maximizing learning and retention. So, for greatest reinforcement, reference aids and digital tutorials should be available on a push (assign and recommend) and pull (on demand search) as well.

For example, reps might watch a short video with a quick reflective question on how to position the product before calling the sales opportunity. Battle cards,

digital sales playbook components, product flashcard modules and sales process how-tos are great sales assets to make available through a Guided Selling system.

## Tracking and Measurement for Continuous Improvement

The ultimate goal of onboarding new hires is to maximize their yield as quickly and efficiently as possible. To gauge whether the onboarding program is meeting this goal, measure the following:

- **Completion and Comprehension.** All onboarding activities must be tied together and tracked to provide an overview of what the rep has accomplished and the level of success he or she has reached. Ensure that new salespeople not only complete each onboarding task, but that they can comprehend and apply the learning in a real selling situation. Gather new hire feedback and continue to improve content and program elements.
- **Real-time Monitoring and Sales Progress.** Guided Selling tools like Veelo can also track what steps new reps took and what assets they utilized during the selling process, allowing managers to review this information and hold additional in-person coaching sessions if needed. Monitoring status and sales progress (pipeline health) can alert managers to opportunities for program improvement over time.
- **Revenue, Pipeline and Velocity.** First-year quota achievement is still the yardstick that most sales organizations use to measure time to productivity for salespeople. With Guided Selling systems within the CRM, it's even easier to compare new hire conversion rates—both overall and by individual sales stage—and velocity against their fellow new hires, the historical averages for reps of equal tenure, and top reps' data. Managers and mentors can use this information to address specific areas, such as

**Think of Guided Selling as a virtual mentor.** Common sales assets include:

- ✓ Battle cards
- ✓ Discovery questions
- ✓ Sales playbook topics
- ✓ Two-minute digital tutorials
- ✓ Product feature and benefit flashcards
- ✓ Sales rep success stories
- ✓ Client success stories
- ✓ Order entry how-tos
- ✓ CRM tips
- ✓ Sales dialog podcasts

providing coaching on prospecting activities for a rep with low conversion rates at the top of the funnel.



**TIP:** Leverage data from your guided selling tool to populate reports and dashboards for new hire comparisons, pipeline velocity, competency progression and sales asset ROI.

## Summary

Traditional onboarding programs tend to inundate reps with information in their first few days or weeks—the majority of which will be forgotten within a week. While in-person and web-based training sessions are indispensable in a comprehensive blended training program, the real benefits come from incorporating a Guided Selling tool that will act as a virtual mentor that automatically recommends relevant training bursts alongside reference aids in the CRM or sales portal. This sort of reinforcement, provided to the sales reps as they need it, helps them move beyond pitching products, and gives them the tools they need to clearly articulate the business value of your solution so they can close more deals.

## About Veelo

Veelo helps companies improve sales effectiveness and productivity with scalable products for managing content and support, tailored to the way sellers learn, retain and use information. Veelo solutions are available as stand-alone web applications and can also be integrated with partner portals and CRM systems like Salesforce, Oracle CRM and Microsoft Dynamics, as well as Marketing Automation Systems such as Marketo and Eloqua. For more information, contact Veelo at 1-800-737-8481 or visit [www.veeloinc.com](http://www.veeloinc.com).