

Sales Onboarding

Leading Practices



Featured Case Studies



May 2018

Introduction

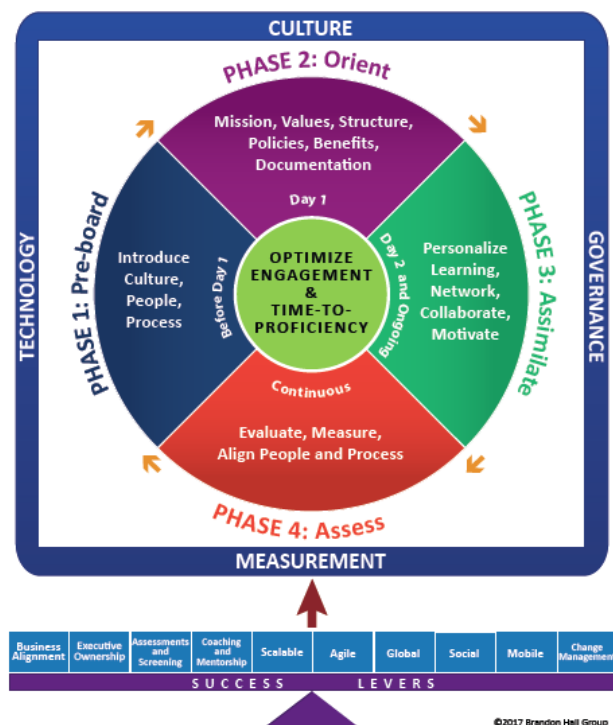
Sales hiring is not easy and new-hire attrition is expensive. Brandon Hall’s latest Evolution of Onboarding Survey shows the voluntary attribution rate averages 10.2% during the first year for all positions in an organization. Other research puts the rate among new sales reps even higher; more than 20%, meaning one in 20 new salespeople leave in the first year.

At Brandon Hall Group, we believe organizations need to take a more proactive approach to onboarding. In this report, we profile four companies — Palo Alto, Godiva, Anthem and Cardinal Health — that implemented or enhanced onboarding programs to engage, assimilate and train new hires. Each of these companies is an award-winning organization in the Brandon Hall Group Excellence Awards program, an international competition among hundreds of organizations in which entries are judged by independent subject matter experts and practitioners.

Cutting across a variety of industries and business requirements, these companies demonstrate best practices for onboarding and retaining new hires and their impact on organizational metrics.

High-Performing Onboarding Framework

Brandon Hall’s latest onboarding research shows that onboarding is being shifted from an administrative function to a strategic business endeavor. We provide a strategic blueprint for organizations that want to adjust or improve their approach to onboarding.



Source: 2017 High-Performance Onboarding Framework (n=36)

Reducing Ramp-up Time for Sales Hires



Company At-a-Glance	
Headquarters	Santa Clara, California, USA
Year Founded	2005
Revenue	FY 2016: \$1.4 billion (49% y-y increase)
Employees	4,100
Industry	IT: Cybersecurity
Website	http://www.paloaltonetworks.com/

The Challenge: As a rapidly growing company, the cybersecurity firm Palo Alto needed to double the size of its sales force to ~2,000 and speed up time to productivity of new hires.

The Solution: Redesign the current five-day bootcamp for new hires and obtain critical quantitative performance metrics and qualitative feedback to determine if the changes are growing new sales reps as quickly as the organization needs to meet its goals.

Implementation: The initiative takes a prescriptive approach to rapidly grow competencies and continuously build and reinforce the right sales behaviors over a nine-month period. Sales new hires must complete pre-bootcamp activities and eLearning before participating in the five-day bootcamp. To encourage completion, incentives include a “champions lunch” with executives for the first 12 individuals completing the pre-work. During bootcamp, new sales reps learn more about Palo Alto culture, products and market and practice strategic sales skills prior to using them in the real world. Managers act as coaches and partners on a series of guided activities, check-ins points, and conversation starters.

Measurable Benefit: Up to the end of FY15, it was taking two to three quarters for sales reps to hit the \$1 million mark. In FY16 with the new training, the average time to hit the one-quarter mark decreased in all theaters of operation. Qualitative feedback on the enhanced program continuously increased to 4.65 in Q1 FY17.

Access to full case study: [Palo Alto Networks Reduces Ramp-Up Time for New Sales Hires](#)

Giving Sellers a Strong Start



Company At-a-Glance	
Headquarters	New York, N.Y., USA
Year Founded	1926
Employees	3,000
Industry	Retail, Confectionary production
Website	https://www.godiva.com

The Challenge: Replace a haphazard approach to knowledge transfer for new hires in 600+ retail boutiques and shops and 10,000+ specialty retailers.

The Solution: Create a consistent onboarding program by using a combination of eLearning and coaching for sales associates (Chocolatiers) and training store managers to ensure they are able to coach staff correctly.

Implementation: On their first day, Chocolatiers face customers. To onboard quickly, the onboarding program relies on a combination of on-the-floor experiences, coaching, six eLearning modules and self-paced study. For example, managers guide the new hires through an experiential tasting of each piece of chocolate and help them practice how to use product knowledge to sell to customers. The eLearning pairs a teaching activity with self-study and practice on the floor. The learning path for managers puts them shoulder-to-shoulder with a trainer. Stores offer the training on iPads provided to all Chocolatiers and managers.

Measurable Benefit: After the program's launch in 2016, Godiva reduced turnover in seasonal by 19.4% versus 2015, increased conversion by 1.7%, hiked sales 1%, and had 0.4% customer complaints about transactions versus the industry standard of 3%.

Access to full case study: [Godiva's "Essentials Onboarding" Gives Sellers Strong Start](#)

Revamping Sales Onboarding Gets Results




Company At-a-Glance	
Headquarters	Indianapolis, IN, USA
Year Founded	2004
Revenue	\$85 billion (2016)
Employees	53,000
Industry	Insurance
Website	https://antheminc.com

The Challenge: Revamp sales onboarding to better meet business needs and increase user engagement across 14 states and seven divisions within Anthem’s Commercial and Specialty Business division.

The Solution: Develop new eLearning modules, provide more role-specific activities, reduce the delay when new hires attend the in-person program, create a structured learning strategy for new managers, and improve the flexibility and timing of training.

Implementation: Anthem designed a tiered, blended-learning strategy that delivers training on 14 core competencies, including product features and benefits, anticipate and handle objections, trust equation, critical thinking, and EQ. How far new hires progress through the program depends on their roles and levels of experience. The first phase offers a 10-week curriculum that includes eLearning, social collaboration with cohorts, and feedback from a facilitator. The second phase involves a rigorous ILT workshop where participants develop their own sales stories and practice in front of their peers. Phase three has a coaching plan with high-performing graduates of the program acting as coaches.

Measurable Benefit: In 2017, participants had an 83% pass rate of the assessments on product/industry knowledge and a 100% pass rate on the retake exam (85% passing score was required.) Just as important, 4.44/5.0 (~103% of goal) reported that knowledge and skills learned impact their ability to do their jobs.

Access to full case study: [Anthem's Revamped Sales Onboarding Program Gets Results](#)

Accelerating Learning for New Reps



Company At-a-Glance	
Headquarters	Dublin, Ohio, USA
Year Founded	1971
Revenue	\$121.5 billion
Employees	37,300
Industry	Healthcare
Website	https://www.cardinalhealth.com

The Challenge: When Cardinal Health reorganized its sales force, each sales rep became responsible for selling a much larger mix of products, sometimes hundreds. Training was essential, especially for new reps.

The Solution: Launch a new learning brand, The Academy of Sales Achievement, and start with ASA Onboarding with the motto: “Role Ready Reps in Record Time.”

Implementation: The program engages learners throughout a 12-month onboarding journey. It has four levels: self-study, interactive learning, then field-based development in weeks 10-12 with regional director involvement; ILT to deepen product knowledge and provide hands-on, practical experiences; reps in their territories practicing and learning; workshops for advanced professional development, including negotiation skills and sales presentation skills. In addition, training managers coached leaders to shift the mentality from getting new hires into the field fast and letting them learn from their mistakes to reviewing expectations and offering support.

Measurable Benefit: Participants in ASA Onboarding were more effective than non-participants in front of customers and achieved better results earlier. For example, data showed a difference of +15% for participants in the first month on the job. By the 12th month, participants’ sales performance hit 102.75% of the goal, ~6% higher than non-participants. From April to December 2016, turnover decreased 18%.

Access to full case study: [Cardinal Health Accelerates Learning for New Sales Reps](#)

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About Brandon Hall Group

Brandon Hall Group is a HCM research and advisory services firm that provides insights around key performance areas, including Learning and Development, Talent Management, Leadership Development, Talent Acquisition, and HR/Workforce Management. With more than 10,000 clients globally and more than 20 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

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