Onboarding Salespeople

Transforming unproductive reps into top performers

by: Dale Stein, Technology Assurance Group (TAG)

It's happened again. You are sitting at your desk, reviewing your sales team members' pipeline reports and you start shaking your head in disbelief. One particular sales rep still hasn't closed anything. You don't know whether to laugh or scream, but all you can muster is to slump yourself over your desk, lean onto your palm that is barely propping up the weight of your chin and stare off into space blankly.

You do not want to fire another salesperson, but you also know you cannot keep tolerating lackluster results. You remind yourself that you are running a business, not a charity, and it is not fair to the rest of the team to keep an underperformer who is dragging everyone else down.

Despite the warning signs, you promised yourself you would give the rep "just one more month" to finally get his (or her) act together. After all, he has the experience, a winning personality and prior successes — and he sincerely appears to be hustling. However, no matter how much you resist it, you are slowly coming face to face with the painful, all-too-familiar truth that you are going to have to fire this underperforming rep and start all over again.

While the frustration mounts, you wonder: "Why does this keep happening to me? Where did all the good salespeople go? Does anyone in this generation actually want to work?" Blaming them soothes the burn for a moment, but, this time, instead of chalking your fate up to bad luck, you recall that this is the umpteenth salesperson you have had to fire at the end of a three-month trial period. Even though you sincerely believed that this one would be different, it is the same story — repeated with different faces — over and over again. It almost makes you wish you could clone yourself.

Finally, a strange thought creeps into your head: "Maybe it's me? Maybe I'm doing something wrong. Could all of these underperforming new hires somehow be my fault?" After 40 years of founding companies, building sales teams and scaling them to acquisition, I must lovingly remind you that yes, of course it is your fault. But if it is your fault, that also means you have the power to completely change your circumstances, too.

By the time you finish reading this article, you are going to have our proven 90-day salesperson onboarding framework that we have shared privately with hundreds of other managed IT, managed print and voice business owners we have coached who have dealt with this exact problem.

An Expensive Mistake

The most expensive thing you will ever do is hire an unproductive salesperson. Before you beat yourself up too badly, know that everyone has been here. It is part of the growing pains associated with transforming any small business into a larger enterprise. The only entrepreneurs who haven't faced this particular challenge are the ones who are playing way too small. This is why it is so critical to nail this onboarding formula (especially for salespeople in particular) because there are very high costs associated with it:

- Your time investment
- Your financial investment (This cannot be recovered if you have to fire a salesperson and start over.)
- Your emotional investment
- How the salesperson's poor performance can demotivate other salespeople
- How the salesperson's poor performance can affect company morale as a whole

There are so many problems that crop up for business owners every day, but billionaire Mark Cuban reminds us why our salespeople's performance matters so much: "Sales cures all." Salespeople can literally dictate the momentum of an organization, their high performance can create the "budget" to fix every other department's problems and they are the foundation behind any organization. That is why it is so vital to properly dial in your onboarding process.

Once you can onboard salespeople so most of them become high performers by the end of your 90-day ramp-up, you will finally be able to shift your focus back to the larger, more strategic vision for the company. But you cannot expect that to happen out of thin air. There is a formula that does require time and hard work, but the returns are phenomenal if you get it right.

Following is our process for you to copy and paste into your organization.

Step 1: The Interview Process — During the interview process, we want to model what is proven. We can achieve that by replicating what Fortune 100 companies are doing. Those companies are certainly not hiring people who merely have phones, résumés and pulses. Instead, they are utilizing sophisticated hiring tools, psychological assessments and personality reports to ensure that candidates: have communication styles that fit their roles; their natural talents will be utilized; their personal values align with company culture; and they possess the mental acuity necessary to perform at the high level you expect. Here are three interview assessments we recommend you utilize:

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(1) DiSC Assessment — This assessment will reveal a candidate's natural communication style and will help you place him in a role that suits his natural strengths instead of forcing him to overcome his personal weaknesses.

(2) An aptitude assessment — In addition to an individual's personality and cognitive skills, a position may require a certain attitude and knowledge beyond basic job fit. Aptitude assessments measure a candidate's specific knowledge, experience and attitude with respect to leadership, sales or customer service. We recommend this test: https://www.hrlvl.com/assessments/selection.

(3) Background checks — This almost goes without saying, but you would be surprised how many companies still skip this step. There are plenty of providers, but we are big fans of this one: https://www.hrlvl.com.

Step 2: Preordered Preparations (Before the rep arrives) — When someone joins the team, we want him to hit the ground running so he doesn't lose two weeks of productivity while he struggles to figure out how to get his email set up and find the bathrooms. Before your new salesperson shows up on his first day, your administrative/technical team needs to make sure the following items are completed ahead of time:

- Set up his phone (with the ability to record calls)
- Set up his laptop/desktop
- Set up his email account
- Preorder his business cards (or vCard)
- Redesign his LinkedIn/social media profile
- Write a press release announcing his arrival to send out to local business journals, publications, etc.

After you make the offer, you should get your team on this immediately, so the new hire can get straight into the "meat and potatoes" of sales.

Step 3: The First Day — On the new hire's first day, the following is what we do; I encourage you to do something similar. We spend a full day teaching him our entire "11-Step Sales Process," which turns sales from a distant, desperate hope into the "next logical step" as a conclusion to a well-thought-out series of touchpoints.

It is a bit too much to share all of that here, but if you would like the full explanation, email me at dales@tagnational.com. We also offer training across the nation/online and, even if you are not a paying Technology Assurance Group (TAG) member, you can request an invitation to one free training, including sales and sales management training. Here is our event calendar for perusal: https://www.tagnational.com/event-calendar.

After that core training, we deliver a series of training programs that include topics like:

- "The Seven Attributes of Successful People": This program demystifies why some people find success in life, regardless of the industry, and why others never do. There are seven key attributes that successful people embody and after training more than 10,000 people, we have found the patterns.
- "How to Prospect" (above the line and below the line): In this program, we explain the principles of bird-dog lead generation, elite group lead generation, how to recruit, and how to train and incentivize referral partners. We also explain "cold approaches" through activities such as door knocking, cold calling and cold emailing.
- "How to Set the Appointment": In this program, we teach salespeople how to overcome gatekeepers (on the phone, online, in-person, etc.) in order to reach decision-makers so they can get to a "yes" or a "no" without spending years in sales purgatory.

We then assign mandatory reading. The first book we give everyone is "Psycho-Cybernetics" by Maxwell Maltz. We also especially like the time management techniques from Alan Lakein's productivity classic, "How to Get Control of Your Time and Your Life."

Step 4: Mentoring Ramp-up (Days two through 10; varies on individual needs) — At this point, your new hire has plenty of information, training and guidance to become successful. However, there is a huge gap between knowledge and actually applying that knowledge. So, ultimately, if we want to ensure his success, we have to invest our personal time, too. This is the key that separates a discreetly floundering salesperson from one who gains real, immediate momentum.

At this point we recommend you invest one hour a day going through each of the subsequent training areas in progressive detail. So, pick one topic and "deep dive" with the new hire. For example, if you are training him on cold calling, take turns demonstrating how it is done. If you are teaching him about how to establish his bird-dog group (i.e., referral group), invite him to attend your next bird-dog meeting so he experiences what it should feel like. This time is intended to work out the kinks and ensure that the training you delivered actually "sticks" so problems are immediately rectified instead of buried until they rear their ugly heads in sales/lead reports.

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Even though this level of attention may seem redundant to you ("But he should already know what to do!"), remember: By investing in your new hire, you empower him to glean insights from you. Often what is obvious to you is revolutionary to him, and unless you take this step, neither of you will know. Even though these insights may be so obvious to you that they feel unnecessary to point out, they might become huge breakthroughs for the new rep. And if you truly do not have the time to train your new rep, do not hire him in the first place.

Step 5: Prospect & Propose (Days 10 through 30) — By now your new hire is well-trained, mentored and empowered. He has had several opportunities to iron out the details with you and to address concerns, problem areas, confusion, etc., before those gaps show up later in his metrics. Now he can implement the training you gave him to generate appointments, leads and conversions.

This is when he gets busy implementing all of the above-the-line methods (bird-dog group, elite group referrals, etc.) and the below-the-line methods (building an email list via ZoomInfo, direct mailers, door-knocking, cold emailing, joining the chamber of commerce's recruitment committee, etc.). This will be intense, but as a sales manager or business owner, it is critical that you join him in the field and participate in his education.

When cold calling, calls should be recorded so you two can review his performance and you can offer advice, objection handling, etc. You need to accelerate his feedback loop. You do not record his calls to bully him. You record his calls so he can mentor himself to learn more quickly than someone who never listens to himself on the phone.

During this period of time, your main role is to help him gain momentum. This is best accomplished by ensuring he is filling his calendar with the two main revenue-generating activities — prospecting and proposing. This is so important it bears repeating. Everything must be oriented around prospecting and proposing. If you do not see these two activities on his calendar, you can expect underperformance.

However, if he has been through the right sales training programs, he will already be well aware of your expectations and should instead only be coming to you when he needs a sounding board or he needs ideas on how to refine his techniques. This framework prevents him from wandering around aimlessly and pretending that being busy means he's productive. It focuses his efforts and eliminates "aimless accomplishments."

Step 6: Momentum (Days 30 through 90) — During this period, you will finally get to take your foot off the throttle a bit. This depends on how successfully you have instilled the proper habits, of course, but if done right, your new sales rep will have sales inertia by now. Remember, inertia causes a moving object to stay in motion unless an opposing force acts on it to change its speed or direction.

This means that as long as your organization maintains the structure, consistency and feedback loops necessary for your sales rep to keep learning, there is a very high likelihood he will flourish. Plus, when he thrives, he helps your business thrive.

Avoid Being Laissez-Faire

Now that you have learned our 90-day salesperson onboarding framework, do you understand why we gasp and clutch for our chests when we hear a business owner say something like: "I just found this hot-shot salesperson who has been amazing in (insert industry here). I'm just going to hire him and see how he does?" It is not about finding fault; it is about recognizing opportunity. ■

Dale Stein is co-founder of Technology Assurance Group (TAG), an organization of managed technology service providers (MTSPs). Collectively, TAG's members do $800 million per year in IT, cybersecurity, telecommunications and video surveillance. They are located in 148 cities across the United States and Canada, and are presently serving more than 780,000 SMBs. He is responsible for developing TAG's strategic planning and guiding its business development. In addition, Stein is the managing partner for TAG's MTSP, i-NETT. He is responsible for i-NETT's daily operations and serves as its president. Stein also founded Westec Security Corp. and served as its CEO. He can be reached at dales@tagnational.com. Visit www.tagnational.com.