



SALES ACTIVATION GROUP

B2B Sales On-Boarding Best Practices

While the urge is always strong to get sellers into the field as quickly as possible, investing in them upfront with on-boarding and coaching will deliver far greater results than allowing them to flounder out in the market. You will also better protect your brand by ensuring the new hire understands why and how your company provides, produces, delivers and prices your products and services.

Pre-set meetings for the new seller/manager with all other department managers, staff and members of the executive team so they come to understand the roles others play in supporting sales, who they should contact when and for what reasons

Make sure that someone joins them for lunch each day their first week

This is important for bonding and trust, make them feel part of the team from the beginning

Have them experience a day in the life of each salesperson – schedule time with each member of the sales team, have them sit in on client meetings, listen in on phone calls, etc.

Pre-set meetings with one client per week for the first 4 weeks

This gives them a safe place to role-play with and get feedback from a friendly source who is well-versed in your business; have the client underscore why they do business with your company

Provide them with a list of:

- Key terms for your business, industry, market, etc.
- The company's capabilities, key differentiators, value proposition statements
- Frequently asked questions and preferred responses
- Your key competitors and their key differentiators

Provide pricing guidelines – including minimums, bundling, or other parameters

Specify which amounts/deals require management approval and which do not

Make sure they understand and can discuss all of the above

Make sure they practice internally, not on prospects and clients; schedule role-playing daily

on the following topics:

- Asking great questions to get the prospect talking
- How best to present the company, products and services
- Qualifying quickly
- The first meeting or discovery session
- How and when to create and present a proposal
- Negotiating and handling objections
- Getting commitments for next steps
- Closing the sale
- Following up
- Identifying incremental opportunities
- Cross-selling among departments





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Share specific expectations of the role in writing – make sure these are realistic and take into account the initial on-boarding/training period

Have the new seller/manager acknowledge understanding both verbally and with their signature

Provide instructions and password for CRM system

Provide expectations for how the CRM system is to be used. What information is necessary, why?

Define how they will be supported and by whom

Define how they will be measured. How often and by whom?

How often will they be given feedback and by whom? Will that be in writing, given orally, etc.?

What reports are they expected to complete and provide to management?

Who specifically should receive a copy?

When are these due?

Where do they go to get the info they need for the report?

There should be a 'huddle' at the end of each day for the first two weeks to assess performance and team fit, answer questions, etc.; week 3 onward have a minimum of one 'huddle' per week, more if necessary

Once management witnesses that the seller is proficient, they can be permitted to contact prospects and clients on their own and the goal- and budget-setting process should begin. Set yourself up for long-term success by ensuring your seller is sufficiently on-boarded, coached and trained.

