

The way to get started is to quit talking and begin doing.

Walt Disney

Summary Report:

Onboarding: Why does it take 5-10 months to ramp sales new hires?

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Executive Briefing

The goal of the study was to answer two questions “Why it takes 5-10 months to ramp sales new hires?” and “How can we reduce ramp-time to full productivity?”

The detailed study comprised 27 publicly-traded and private technology organizations ranging from 150 to over 3,500 employees. We reviewed onboarding processes, systems, sales content and interviewed and observed sales new hires in conversations, meetings and internal discussions.

Why it takes 5-10 months to ramp sales new hires?

The findings are that, on average, sales new hires have 2,798 pages/slides of content to review located in 2-3 training/content systems. ‘Passive’ content directed at learning and education accounts for 93% of the content created and maintained. In contrast, ‘active’ content that impacts new hires ability to identify, position, qualify and compete for business is only 7%. In some organizations the first time that sales new hires spoke to a prospect was 7 weeks, ran their first sales presentation was 9 weeks and hosted their first formal sales discovery call was 10 weeks. When asked, salespeople believed that nearly 50% of their first 3 months had been ‘non-productive’.

How do we reduce the ramp-time to full productivity?

The study recommends increased focus on development of ‘active’ content to support key activities like presentation points, discovery questions, qualification criteria, objection handling and competitors. By developing onboarding programs that emphasize early engagement with prospects, supported by check-lists to ensure that important points are covered, organizations can reduce sales onboarding and ramp-time. This emphasis is on ‘learn by doing’ supported by more appropriate tools.

2. Study Background

The goal of the study was to answer two questions “Why does it take 5-10 months to ramp sales new hires?” and “How do we reduce the ramp-time to full productivity?”

Research, studies and surveys from numerous independent organizations broadly agree that for **inside sales the average ramp-time to full productivity is 5 months**, and for **outside/field sales it is 10 months**. In organizations with more products and greater sales complexity, these ramp-times can be significantly higher.

The objective of this study was to investigate the reasons that impact sales new hire ramp time. Specifically, we wanted to understand the ‘what, when and how-much’ from the first 3 months of a sales new hire onboarding, and determine what factors led to faster or slower time-to-proficiency, or ‘ramp-time’.

Last, we wanted to offer recommendations for how organizations could re-assess their onboarding programs to optimize time-to-proficiency for their business.

2. Study Methodology

This study presents the findings from detailed studies at 27 organizations.

- We followed, or participated in, the new-hire and onboarding processes
- We completed learning management courses, online training and in-person training
- We reviewed content intended for internal-use and/or partner-use
- We conducted interviews with salespeople, managers, executive and partners
- We listened to sales calls, discussions & meetings with new hires and top sellers.

The study questions were formulated in-advance and we sought the same information from each participating organization.

‘Study Facts’ in the left sidebar highlight items from the study. ‘Study Analysis’ sections add context to the study and aid interpretation of the data. They also provide commentary on the findings and recommendations.

2. Acknowledgements and Questions

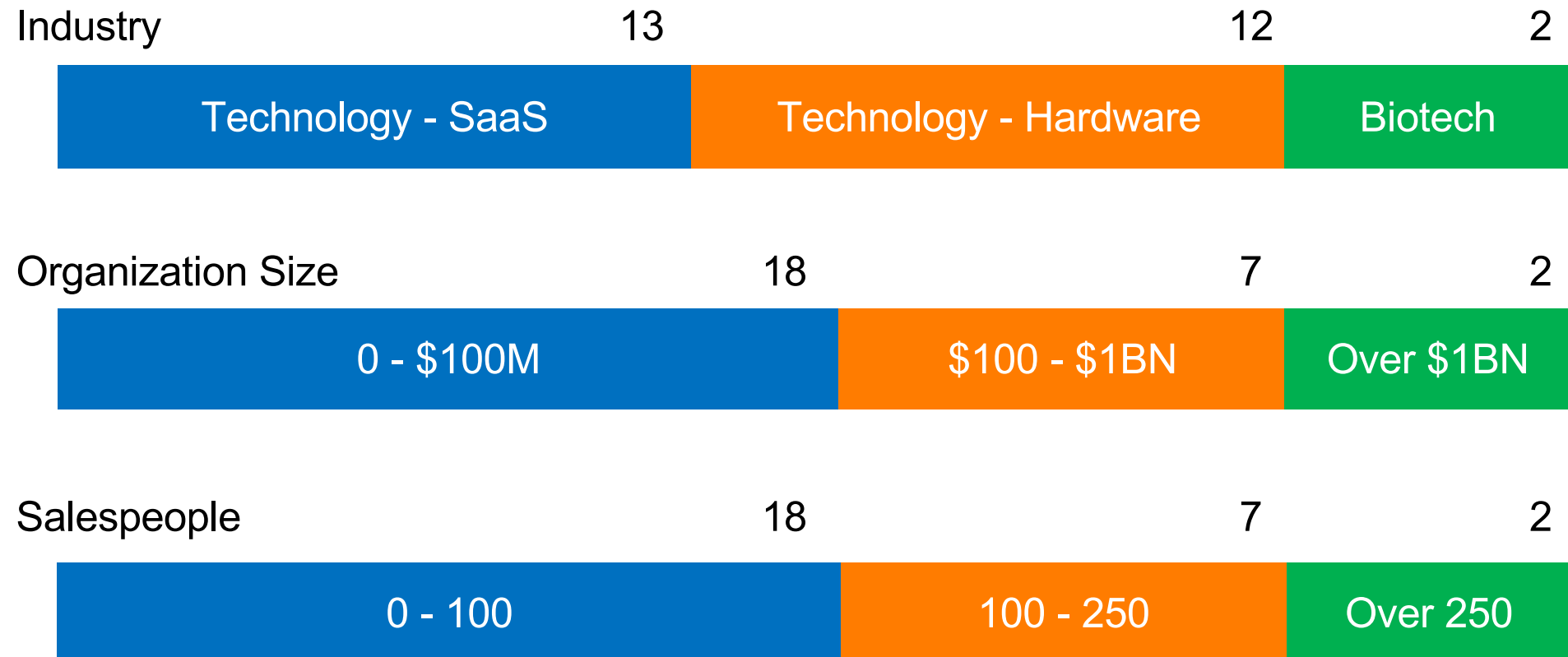
We thank all of the customers, prospects, partners, analysts and well-wishers who shared their opinions and insights to assist in the structure, development and editing of this report.

We recognize other organizations who author studies, articles and opinions in the area of onboarding sales new hires, including; the AA-ISP, Brainshark, Qvidian, The SAVO Group, Sirius Decisions, Gartner Group, The Alexander Group, Sales Benchmark Index, Smart Selling Tools, CSO Insights/MHI Global, Clearslide, CallidusCloud, Franklin Covey, Richardson, Sales Hacker, Sandler Training and ZS Associates.

For additional information or questions contact Replystream, Inc., at 19925 Stevens Creek Blvd, Suite 100, Cupertino, CA, 95014 or email: james.murray@replystream.com.

2. Study Participants

The profile of the 27 study participants is as follows:



3. Systems Summary

The systems included were those that directly aid and support onboarding sales new hires who may not have the experience and knowledge of the existing salespeople.

Between 40-50% of participants provided either online training or learning management systems to support sales new hires. Only 15% provided formalized coaching to augment and reinforce the formalized training.

70% of participants organized and shared content via a content management system, portal or CRM but fewer than 20% had a specialized sales enablement system.

Configure-price-quote (CPQ) and proposal management systems were dependent on the products sold by the participant. Business justification systems were only used by 13%.

Customer relationship management (CRM), marketing automation, customer support and operational (commissions, expenses, benefits, etc.) systems were considered foundational and excluded from this study.

Study Analysis: Systems

Study Tip:

Archive sales content that is outdated or superseded.

Reduce the sales content to review by new hires by ~30%.

All participants have made investments in creating, organizing and maintaining content for onboarding sales new hires.

All participants have implemented formal content management systems, sales enablement systems or, at a minimum, maintain organized libraries of content for sales new hires. There was lower usage of structured coaching, online training and learning management systems.

A common theme across all participants was the incidence of outdated or superseded content files still available in these systems. New hires are not always able to discern the latest and most relevant content, and will often review these outdated files.

Recommendation: Periodically and proactively review and archive outdated content.

Result: Immediately reduce the volume of content to review (and time to complete).

1. Training, Coaching and Learning Management Systems

Study Fact:

Formalized coaching systems are deployed in 7% of study participants.

The number of organizations with onsite/online training programs.



The number of organizations with formal coaching systems and/or programs.



The number of organizations with learning management systems [9 modules/courses].



2. Content Management, Portals and Sales Enablement Systems

Study Fact:

Specialized sales enablement systems are deployed in **22%** of study participants.

The number of organizations with sales content-management systems.



The number of organizations with company-wide portals, including sales.



The number of organizations with specialized sales enablement systems.



3. Configure, Price & Quote, Proposal and ROI Systems

Study Fact:

Sales proposal systems are deployed in **33%** of study participants.

The number of organizations with sales configure-price-quote systems.



The number of organizations with sales proposal systems.



The number of organizations with specialized business justification/ROI systems.



4. Content Summary

Study Fact:

Formalized coaching systems are deployed in 7% of study participants.

Organizations create content to assist sales new hires. Among the participants, the average was 2,798 pages/slides of content available for onboarding sales new hires. The maximum is 4,751 pages/slides. At 1 page/slide every 2 minutes, 2,798 pages/slides would consume over 93 hours to review.

The content types that contribute the most pages/slides are product fact sheets, white papers, presentations, analyst reports and case studies.

The content types that contribute the least pages/slides are qualification criteria, discovery questions, objection-handling and competitive positioning. These four areas were under-served across all participants, with a less formal content creation and approval process before publication and roll-out.

Marketing produces nearly 90% of all content provided to sales. This content is often re-purposed for many uses, mostly written publication, in addition to assisting sales.

Content Inventory and Categories

We classified sales and marketing content into the 'active' and 'passive' content to indicate if the content was informational, or could be used to perform a sales role.

Passive

- Case Studies, Customer References and Industry Definitions
- Personas, Organization Profiles and Use-Cases
- Product Families, Fact Sheets and Technical Specifications
- White Papers, Sales Presentations and Analyst Reports
- New Hire-Specific Content for Induction and Onboarding

Active

- Qualification Criteria, Discovery Questions & Situational Facts
- Competitive Analysis, Kill Points and Objection Handling
- Sales Call and Meeting Support and Guidance

Study Analysis: Content

Study Tip:

Focus effort on **active** content to aid new hires.

Create visual mind-maps of content to identify active vs. passive content.

All participants provided an extensive variety of product marketing and sales enablement authored content to sales and sales new hires.

Given the emphasis on learning, training and education, written documents and presentations were the most common formats and types of files. This form of 'passive' content contains information necessary to increase knowledge, awareness and credibility with prospects, customers and partners.

There was limited content to assist salespeople performing critical activities of their role, such as discovery, qualification, objection-handling and competitive positioning. This 'active' content was not widely available to any members of the sales organization.

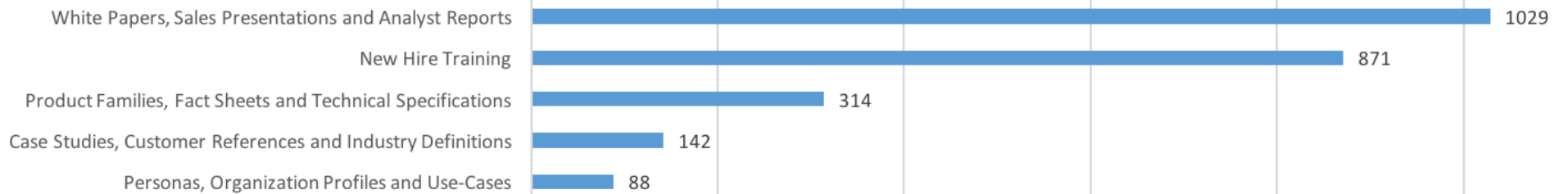
Recommendation: Create 'active' content that can be used to perform the sales role.

Results: Sales new hires have 'job aids' to enable shorter time-to-proficiency.

Sales Content by Type and Number of Pages/Slides

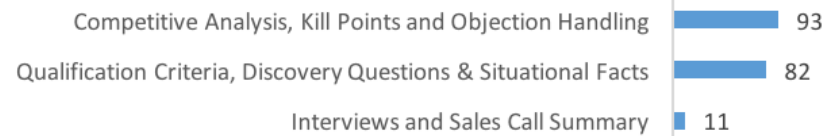
Passive

93%

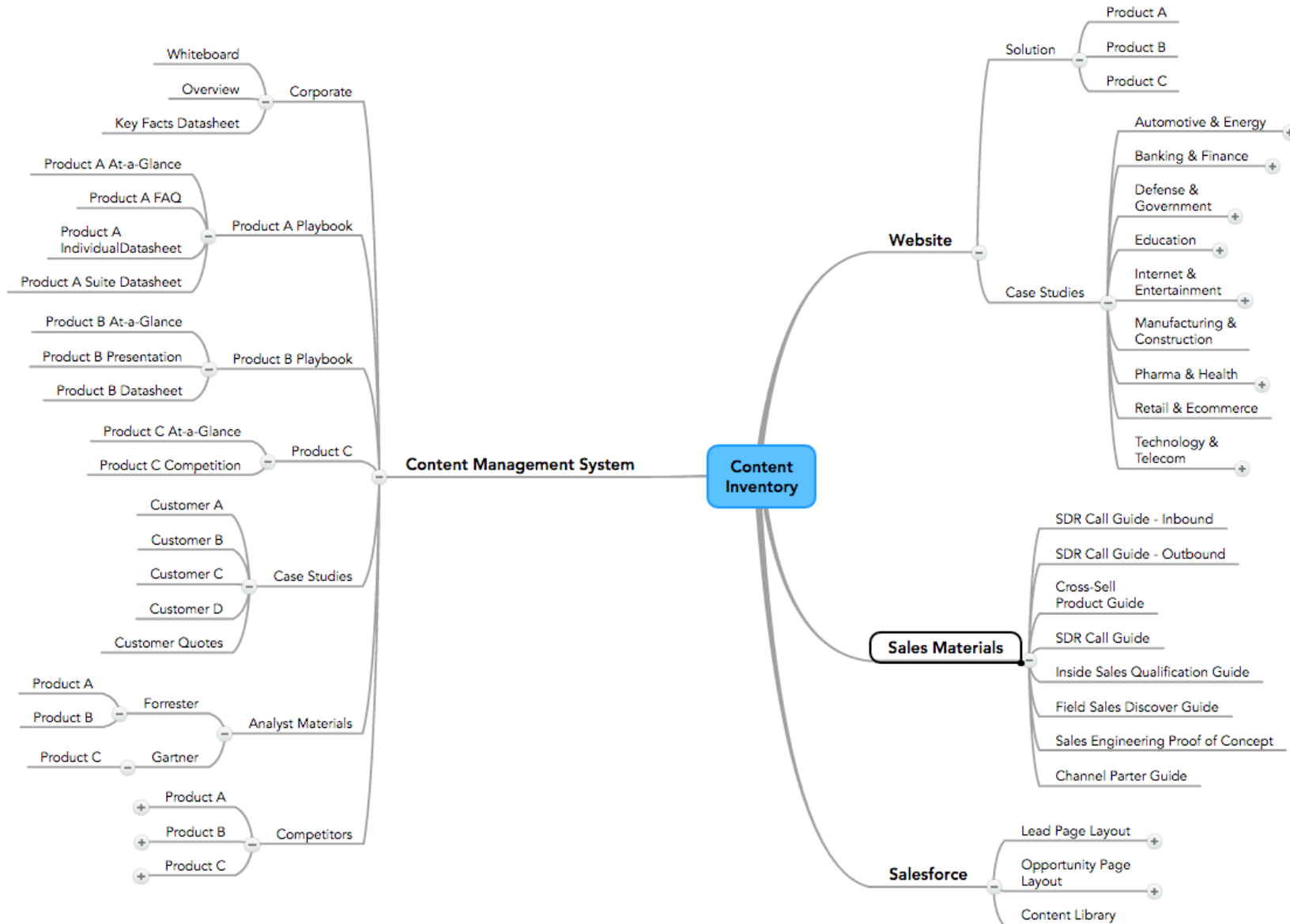


Active

7%



Example Content Inventory

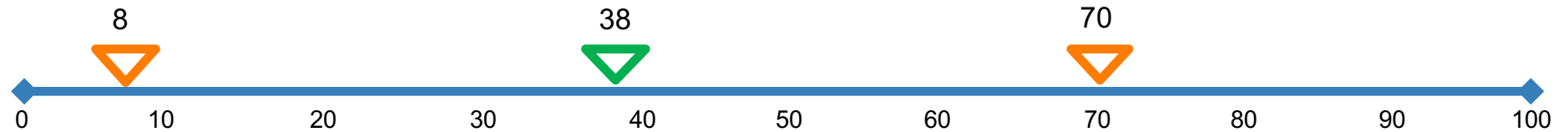


4. Case Studies, Customer References and Industry Definitions

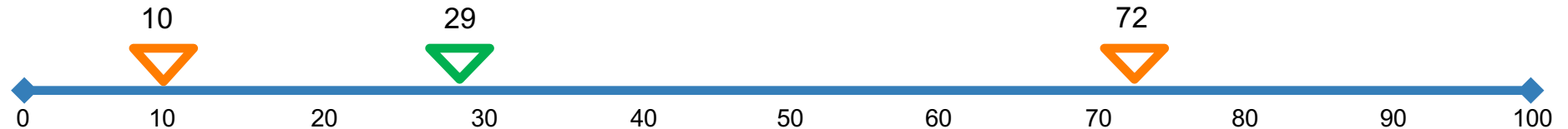
Study Fact:

Average of **124** pages of case studies and customer references maintained across **18** industries and market segments.

The number of case studies that organizations typically create [2.5 pages].



The number of customer references/testimonials that organizations maintain [1 page].



The number of industry definitions that organizations maintain.



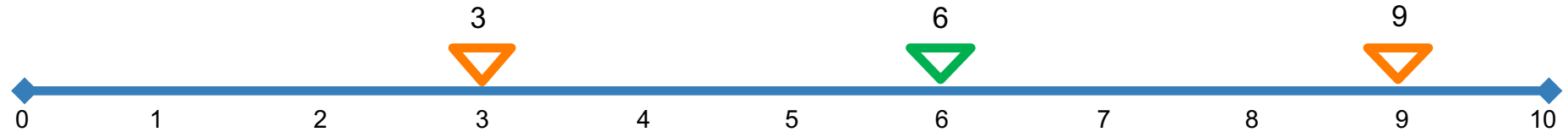
Minimum Average Maximum

5. Personas, Organization Profiles and Use-Cases

Study Fact:

Average of **88** pages of personas, organization profiles and use-cases maintained.

The number of **personas** that organizations identify [4 slides].



The number of **organization profiles** (size, industry, product) maintained [4 pages].



The number of **use-cases** that organizations define [2 pages].



Minimum Average Maximum



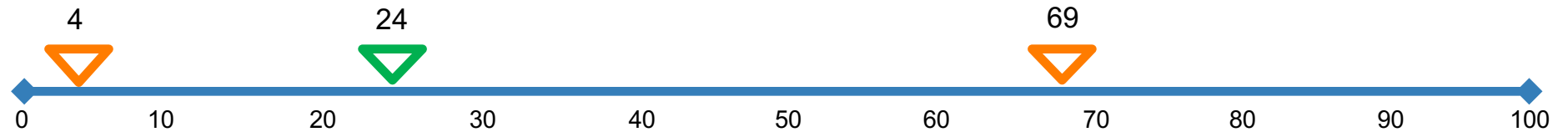
The legend shows three symbols: an orange downward-pointing triangle, a green downward-pointing triangle, and an orange downward-pointing triangle, corresponding to Minimum, Average, and Maximum values respectively.

6. Product Families, Fact Sheets and Technical Specifications

Study Fact:

Average of **314** pages of product and technical documents across **24** product suite or families.

The number of product families that organizations offer.



The number of product fact sheets that organizations create [5 pages].



The number of technical specifications that organizations define [20 pages].



Minimum Average Maximum



The legend shows three downward-pointing triangles: an orange one for Minimum, a green one for Average, and another orange one for Maximum.

7. White Papers, Sales Presentations and Analyst Reports

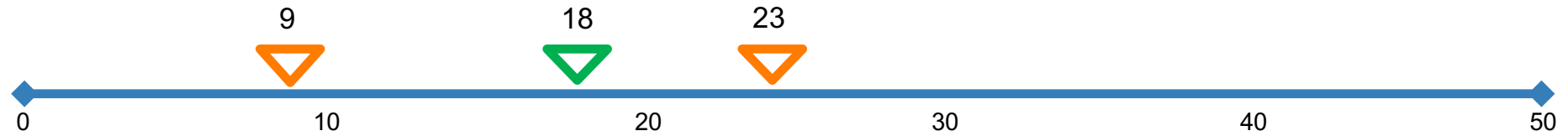
Study Fact:

Average of **1029** pages of white papers, sales decks and analyst reports.

The number of white papers that organizations create [13 pages].



The number of formal sales presentations that organizations create [43 slides].



The number of analyst reports that organizations acquire [25 pages].



Minimum Average Maximum



Legend: Minimum (orange downward triangle), Average (green downward triangle), Maximum (orange downward triangle).

8. Qualification Criteria, Discovery Questions & Situational Facts

Study Fact:

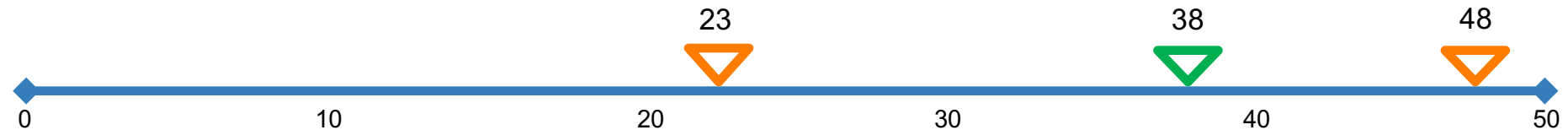
Average **82** questions to qualify a prospect and complete the discovery process.

The common answers are not specified.

The number of qualification criteria that organizations specify.



The number of discovery questions that organizations require.



The number of environmental/situational facts that organizations request.



Minimum Average Maximum



The legend shows three downward-pointing triangles: an orange one for Minimum, a green one for Average, and an orange one for Maximum.

9. Competitive Analysis, Kill Points and Objection Handling

Study Fact:

Average **33** pages about competitors, market trend and analyst reports and responses.

The number of competitive analysis briefings that organizations provide. [7 pages]



The number of competitive kill points documents that organizations produce. [1 pages]



The number of objection handling documents that organizations create. [2 pages]



Minimum Average Maximum

Legend: Minimum is represented by an orange downward triangle, Average by a green downward triangle, and Maximum by an orange downward triangle.

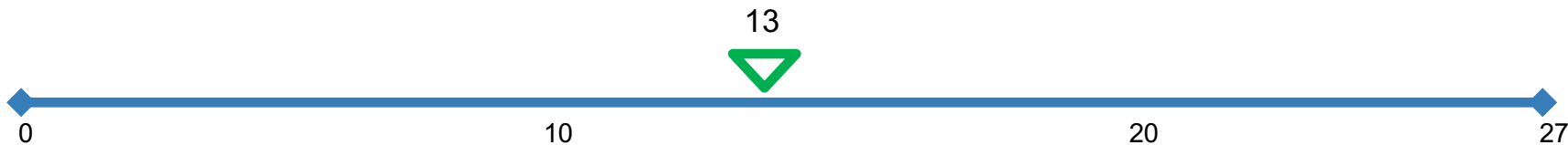
10. Playbooks [comprising content types 4-9 above]

Study Fact:

The average duration to develop a playbook is **9 months**.

Playbooks rarely list the most typical responses to questions.

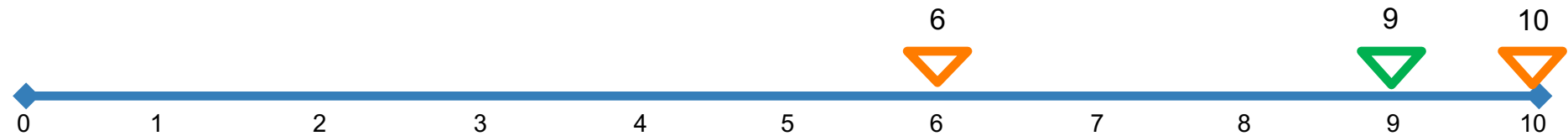
The number of organizations with internally developed playbooks for sales [73 pages].



The number of organizations with externally developed playbooks for sales [95 pages].



The duration to develop a playbook, in months, from project start to delivery.



Minimum Average Maximum

5. Induction and Training Summary

89% of participants had a documented onboarding process for sales new hires. This included formal training and learning.

Some 50% of participants had a formal peer 'buddy' program to support the new hire through the onboarding process. Only 25% participants specified peer 'ride-along' sessions so the new hire could attend sales calls and meetings with their peer.

Most participants completed formal sales kick-off events, at least annually, some quarterly. The objective of sales kick-off was not seen primarily as education. On-going education and updates are occurring weekly through lunch-and-learn and brown-bag sessions, with monthly or quarterly product updates being scheduled as needed.

Study Analysis: Induction and Training

Study Tip:

Create 'peer' buddy programs to utilize 'active' content.

Track the # of prospect meetings new hires attend.

Participants noted that the induction and onboarding of new hires increases the workload on the sales organization, especially line managers and team leaders.

Beyond formalized induction and training courses and events, the managers were challenged to support their existing teams and new hires effectively. With large enough team size and a mature sales organization, the introduction of 'buddy' programs was one way to engage and develop sales new hires.

Only 3 participants implemented sales certification systems and these focused mainly on market and product knowledge. These systems could be used to certify key sales activities like initial sales presentations, discovery calls, qualification and competitive positioning that they will need as they start their new role.

Recommendation: Consider certification programs focused around key selling activities.

Results: Sales new hires focus on practicing key selling activities.

11. Induction and New Hire Processes

Study Fact:

Formal peer-led 'ride-alongs' were done in **24%** of study participants.

The number of organizations with a documented process for onboarding sales new hires.



The number of organizations who assign a peer 'buddy' to each sales new hire.



The number of organizations who have peer 'ride-along' sessions for each sales new hire.



12. New Hire Training and Induction

Study Fact:

The average number of role-play sessions for new hires was **3**.

The number of non-sales induction modules for onboarding sales new hires [23 slides].



The number of sales-related training modules for onboarding sales new hires [41 slides].



The number of interactive or role-play sessions for each sales new hire.



Minimum Average Maximum

Orange downward triangle Green downward triangle Orange downward triangle

13. Ongoing Training and Education

Study Fact:

The average number of internal recurring education sessions per month is **12**.

The number of organizations with formal sales kick-off event.



The number of organizations with formal internal sales certification programs.



The number of recurring education sessions per month [estimated 15 slides].



6. Salesperson Summary

Less than 25% of participants provided sales content to support sales new hires engaging with prospects and customers in telephone calls, on-line meetings and in-person meetings.

Some 15% of participants provided formal training, materials and guidance on conducting formal first (commonly 'discovery calls') meetings. 26% of participants provided checklists and reminder for critical and repetitive task like qualification and quote specification.

In some organizations the first time that a sales new hires spoke to a prospect was 7 weeks, ran their first sales presentation was 9 weeks and hosted their first formal sales discovery call was 10 weeks (after hiring date).

On average, salespeople stated that 45% of their first 1-3 months was non-productive. The perception, albeit subjective, was that they were not yet proficient for customer engagement but had no further 'worthwhile' or value-added tasks to complete.

Study Analysis: Salespeople Perspective

Study Tip:

Checklists are a simple, inexpensive way to support new sales hires.

Compared to the total volume of product marketing and sales enablement content created there was limited assistance available to support sales new hires in performing their role. The participants current practices relied on the knowledge acquired through training, observation of experienced sellers and manager coaching to be sufficient to prepare them to perform their role.

While training was provided for an initial presentation, there was limited training (only 4 participants) for new hires on how to conduct a prospect discovery call or complete the qualification process. We noted that checklists were used by 85% of participants to guide the qualification process, viewed as one of the most critical sales activities, with 40% storing some or all of the information captured in a CRM.

Recommendation: Consider implementing checklists for ‘active’ content - key presentation points, discovery questions, qualification criteria, objection handling and competitors.

Results: New hires can follow checklists when observing experienced salespeople and use them when they start performing their new role.

14. Sales Call and Meeting Support

Study Fact:

15% of the organizations train their sales teams to run a discovery call with a prospect.

The number of organizations who provide sales scripts to sales [11 pages].



The number of organizations who provide formal discovery call training to sales.



The number of organizations who provide qualification checklists to sales [2 pages].

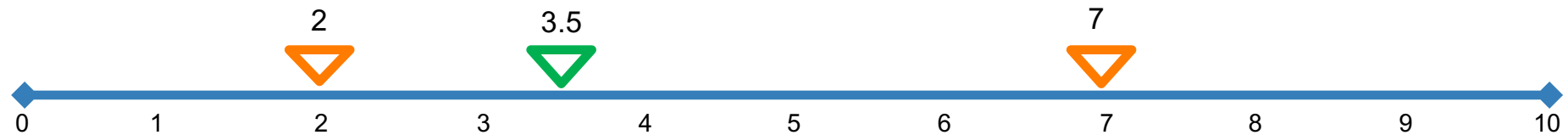


15. First Conversations and Meetings

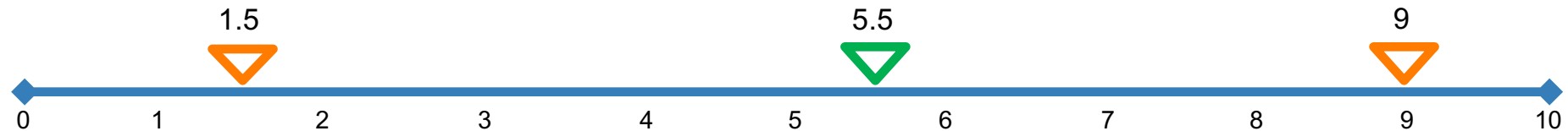
Study Fact:

6 weeks was the minimum earliest to complete the first formal discovery sales call.

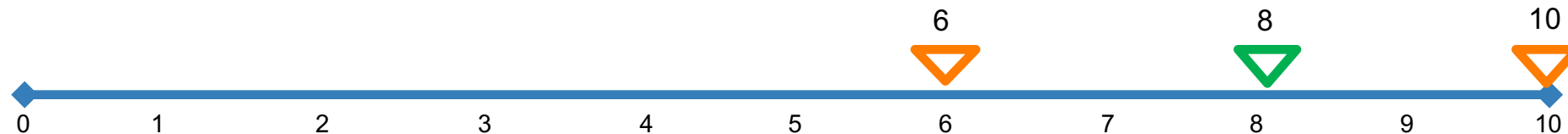
The number of weeks before sales new hires first spoke with a prospect or customers.



The number of weeks before sales new hires ran their first sales presentations.



The number of weeks before completing the first formal sales discovery call.



Minimum Average Maximum

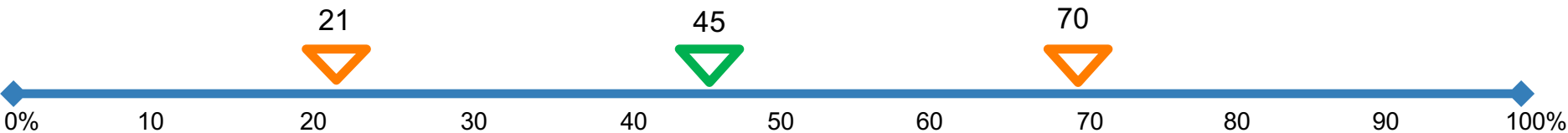
A legend showing three downward-pointing triangles: an orange triangle for Minimum, a green triangle for Average, and an orange triangle for Maximum.

16. Sales New Hire Perspective (Months 1 through 3)

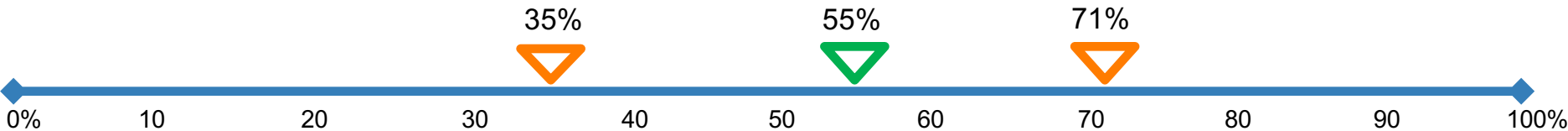
Study Fact:

Perceived **45% non-productive time** in the first 3 months – not seen as proficient and with no tasks or worthwhile education to complete.

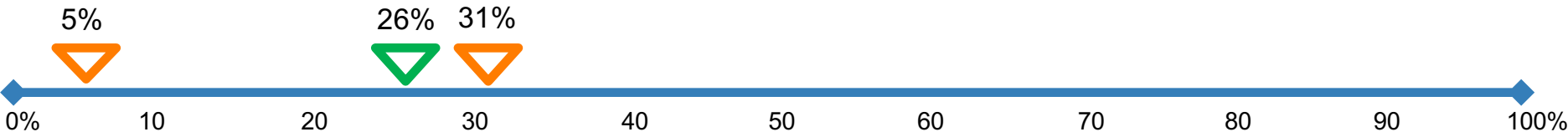
The percentage of time sales new hires were non-productive in months 1-3.



The percentage of time sales new hires invested in training and learning in months 1-3.



The percentage of time sales new hires invested in practice and 'doing' in months 1-3.



Minimum Average Maximum

7. Conclusions and Recommendations

The conclusions of the study, confirmed in interviews with executives, managers, salespeople and sales new hires is that there are five main onboarding challenges:

1. Reduce sales content volumes – only 3-5% of all sales content is usable when salespeople are engaged in conversations, discussions and meetings.
2. Distillation of best practices – sales new hires are seeking the questions and criteria that top-performing salespeople use to discover and qualify prospects.
3. Learn by doing – provide opportunities to observe existing salespeople in live customer and prospect calls, meetings and discussions.
4. Overcoming objections - competitive positioning and objection handling were noted as two areas of low content quality and investment.
5. Discovery - the benefits of a formal discovery call process is slowly being appreciated, but there remains a lack of formal content and training in this area.

(Our) Answers to the two Study Questions

“Why does it take so long for onboarding sales new hires?”

- Large volume of content created in file-based formats and stored in systems
- Organizations still focus on formalized training vs. learning by doing
- Onboarding approaches have built-in delays before prospect engagement occurs
- Participants had few programs that focused on the ‘acts of selling’, such as telephone calls, trade show discussions, online meetings, discovery calls and onsite meetings.

“How do we reduce the ramp-time to full productivity?”

- Develop content to support ‘learn-by-doing’ – conversations, meetings and discussions
- Ensure sales new hires have early engagement with prospects and customers
- Utilize check-lists to communicate the right message and ask the right questions
- Train sales new hires to organize and run discovery meetings
- Think apprenticeship and doing versus education and learning.

8. About Replystream

Replystream provides a real-time platform to guide the conversations, meetings and discussions your sellers and partners conduct with prospects. We enable marketers to deliver dynamic content to sales that adjusts to the seller role, prospect persona and organization profile. Replystream works seamlessly with your CRM, recording the marketing content shared, replies received and any questions and requests made by the prospect.

To contact Replystream, Inc., or visit www.replystream.com

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9. Quotes (from some people you may know)

I hear and I forget.
I see and I remember.
I do and I understand.

Confucius

For the things we have to learn
before we can do them, we learn
by doing them.

Aristotle

I am always doing that which
I cannot do, in order that I may
learn how to do it.

Pablo Picasso

Anything worth doing is worth doing
poorly until you learn to do it well.

Zig Ziglar

If you're not making mistakes, then
you're not doing anything. I'm positive
that a doer makes mistakes.

John Wooden

The way to get started is to quit
talking and begin doing.

Walt Disney

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