

Client Case Studies



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the performance needle

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Outside Sales Executive Onboarding Case

Background

This technology industry service startup grew quickly as a forerunner in a new and rapidly expanding market segment. Infused with external capital and charged with growing revenue fast, the company embarked on a strategy to hire senior level Sales executives who could bring success with large, complex sales.

In addition, a large part of the company's success to date is attributed to its proprietary business practices and cross-functional execution capabilities—both are an integral part of the sales process. Given the breadth and complexity of the sales process, the company's original plan called for a 12-week Onboarding process that would “certify” a sales executive's knowledge and understanding of how the company sells and does business.

Goal

The goal of the Onboarding program was to ensure that new sales executives attained productive, on-the-job performance as quickly, effectively, and efficiently as possible. Specifically, the objectives were to:

- Ensure that participants could demonstrate their understanding of the company's sales process and business practices
- Establish a cross-functional orientation to selling and build relationships with key sales process partners
- Reduce the formal Onboarding learning process from 12 weeks to 5 weeks

Challenges

The Onboarding program design had to address the following challenges:

- Create the experience and learning of a 6-9 months sales cycle within 5 weeks
- Communicate a significant amount of company information that will directly influence the executives' performance in this program and in the field
- Conduct the Onboarding program for one Sales executive at a time and/or multiple executives staggered over time
- Hold the attention of experienced senior level Sales executives in the learning process when they are eager to be out selling

Approach

The program approach blended various learning methods within a structured framework of eLibraries, presentations, meetings, real-world tasks, shadowing, mentoring, and apprenticeships.

The underlying context of the Onboarding approach is a Sales Cycle Simulation based on the sales process that was used to acquire one of the company's largest clients. Sales Cycle activities, deliverables, and presentations were blended into the 5-week learning process and provided realistic “performance tests” at each phase of the Sales Cycle.





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Areas covered within the Sales Cycle included:

- Perform due diligence on a prospective client
- Create a prospective client account plan
- Develop a pitch and several contextual value propositions
- Deliver the pitch and value propositions to a panel of experts
- Design an implementation solution with the account service team
- Recommend a pricing scheme for the solution
- Craft and deliver a proposal presentation to the prospective client (role played by company executives)

Participants were also immersed into “on the job” learning contexts in numerous functional organizations, such as Marketing, Inside Sales, and Account Management, to meet their key counterparts and to learn about the different functions, roles, responsibilities, challenges, targets, key projects, etc. Within Account Management, for example, new sales executives:

- Worked with an assigned primary account team
- Participated in account-specific training
- Conducted research and quote preparation and shadowed reps making those specific calls
- Prepared team analytics with a Team Lead
- Presented an overview of the account to the account leadership team
- Worked with a channel account team to understand the nuances of the channel business
- Worked with “support team” members from across the company to participate in cross-functional meetings and activities

In the late stages of the Onboarding program new sales executives were apprenticed to an experienced Outside Sales executive. They were then slowly “weaned off” until both the participant and experienced executive agreed that the new salesperson was ready to call on clients and lead his/her team.

Participants moved through the Onboarding process as quickly as they were able to demonstrate learning objectives by successfully completing varying types of performance tests. Most performance tests involved being observed performing a task or presenting back to a subject matter expert or group what the participant had learned. In these cases the primary focus was to give and receive feedback to aid the learning process.

Performance tests associated with key steps in the Sales cycle were evaluated more critically by company executives. In addition to several client-focused presentations conducted during the Sales cycle simulation, the program culminates with a full proposal presentation to the prospective client executives (role played by senior executives). While the Onboarding program was not intended to develop sales skills, the performance test allowed company executives to assess the sales skills of new hires.





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Results

Overall, the program created an intense, engaging experience that challenged participants and provided a clear path to accelerate their learning and quickly prepare them to start generating revenue.

- ❑ Participants were impressed with the amount of thought and rigor that went into the process and said it demonstrated the company's commitment to their success
- ❑ Participants estimated that the program enabled them to get to a "productive" level 40-50% more quickly than past onboarding experiences
- ❑ The "Performance Test" component of the program enabled the company to identify and take action on a hiring mistake within 4 weeks rather than waiting 6-9 months for the new hire to go through a complete Sales Cycle

About LSA Global

Since 1995, LSA has helped organizations create and maintain competitive advantages through people. Over 85% of our business comes from repeat clients and our customer satisfaction rating is 97.5%. Our clients tell us that we are different. Our clients tell us that we save them both time and money. Our clients tell us that they appreciate access to experts across many areas

Our Leadership and Management clients report that we decrease their costs by up to 50%, while helping increase speed-to-productivity by 60% and decrease unwanted attrition by up to 40%.

Our Sales clients confirm that they have grown sales by 40%, increased units sold by 42%, increased average pricing by 12%, and closed over 50% of their pipeline.

Our Project Management clients inform us that, by regularly completing projects that meet or exceed expectations, they have become an anomaly in the world where most projects disappoint or fail.

Our clients succeed in the marketplace through increased revenue, decreased costs, and higher productivity. They maintain that our rigorous assessment, implementation, and measurement capabilities bring them tangible results. As an organization, we are fiercely devoted to supporting their success.

