



THE
**SALES
MANAGEMENT**
ASSOCIATION

RESEARCH BRIEF

SALESPERSON ONBOARDING

FEBRUARY 2015

SUMMARIZING RESEARCH CONDUCTED IN Q4 2014 WITH 104 PARTICIPATING
BUSINESS-TO-BUSINESS SALES ORGANIZATIONS

RESEARCH UNDERWRITERS

BUSINESsefficacy
the power to produce results



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Research Brief: Salesperson Onboarding

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The Sales Management Association is a global, cross-industry professional organization for sales operations, sales effectiveness, and sales leadership professions. We provide our members with tools, networking, research, training, and professional development.

Our research initiatives address topics relevant to practitioners across a broad spectrum of sales effectiveness issues. Our research is available to members on our site at www.salesmanagement.org.

In addition to research we publish best practice tools, archived webcasts, and expert content. Visit our website at <http://salesmanagement.org> to learn more.



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1

ABOUT THE RESEARCH

1.1 EXECUTIVE SUMMARY

When they work, onboarding programs improve salesperson productivity and new hire success rates, which can profoundly impact overall sales organization performance. Yet onboarding approaches vary in scope, intensity, and outcomes across firms. This study offers a survey of onboarding practice in business-to-business sales organizations, identifies onboarding program elements that contribute to success, and quantifies onboarding's business impact.

Based on data from more than 100 firms, our study shows wide variation in onboarding program effectiveness. For more than 60% of firms, sales onboarding success lags management expectations. This results, in part, from onboarding programs' insufficient structure, and inconsistent application.

Furthermore, one-third or more of salespeople lack proficiency in 12 fundamental selling skills after completing onboarding. Onboarding programs are best at providing content knowledge related to internal firm resources, and leave selling skills for post-onboarding development.

Effective onboarding programs offer substantial returns to sales organizations that field them. For firms with the best programs, new-hire sales people (who are also new to sales) became productive 3.4 months sooner, on average, a time-to-productivity 37% faster than firms with low-



performing programs. And effective onboarding correlates with overall firm success. Firms with effective onboarding reported 10% greater sales growth rates, and 14% better performance in firm sales and profit objective achievement.

As a group, respondent firms' investment priorities for onboarding improvement include making onboarding programs more structured, enhancing account planning for new hires, offering more specialized training (specific to new salespeople), and making performance goals more tailored to individuals.

Onboarding links strategically with overall sales force capacity and staffing. Inefficient onboarding, our research suggests, may affect hiring and turnover in unanticipated ways – by delaying hiring decisions, and slowing hiring while new salespeople get up to speed – and many firms report poor onboarding results along with both staffing and turnover rates that are too low. Solving for onboarding offers management the confidence and flexibility to speed hiring, and more quickly replace low performers.

1.2 RESEARCH APPROACH

This study aggregates participating firms' responses to a web-based survey. The Sales Management Association developed the survey and recruited participants from our membership and broader audience of sales managers and sales operations professionals. In exchange for participating, we offer respondents advance copies of the detailed study report.

Before reporting results, we eliminate invalid or ineligible responses, and sometimes contact respondents to clarify their responses. Survey results are only reported in aggregate, and never in a way that would compromise the identity of any single respondent. All individual respondent data are treated with strict confidentiality.



RESPONDENTS	TOTAL
FIRMS	104
SALES MGRS.	17,000
SALESPEOPLE	132,000

1.2 THE SURVEY'S 104 PARTICIPATING FIRMS FIELD AN AGGREGATE SALES FORCE OF 17,000 SALES MANAGERS AND 132,000 SALESPEOPLE.

1.3 RESEARCH TIMING AND SCOPE

This research represents summarized data from 104 participating firms, directly employing more than 130,000 sales professionals. Data was collected during the months of October, November, and December 2014. Respondent demographics and descriptive information is summarized in report section 5 below.

1.4 RESEARCH UNDERWRITERS

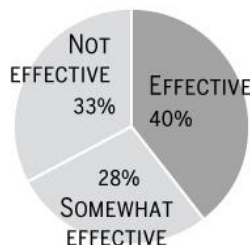
This study was made possible in part through the underwriting support of Business Efficacy and Qvidian. Sales Management Association underwriters provide annual financial support to the Sales Management Association. Underwriters may suggest research topics, participate in ongoing research projects, and encourage participation or otherwise promote research initiatives.

Underwriters are not involved with research administration, data collection, analysis, interpretation, or report development, unless explicitly noted in the report. Also, unless noted, underwriters do not pay a research-specific fee or directly commission research initiatives.

The Sales Management Association is grateful for the support underwriters provide to our research efforts.

2

ONBOARDING PROGRAM IMPACT



2.1 JUST 40% OF RESPONDENTS RATE THEIR CORPORATE SALES ONBOARDING PROGRAMS "EFFECTIVE."

2.1 ONBOARDING PROGRAMS' OVERALL LOW EFFECTIVENESS

Just 40% percent of respondent firms consider their onboarding efforts "effective;" 28% consider their programs "somewhat effective;" and one-third (33%) judge them to be "ineffective."

Of the two issues, respondents find staffing most challenging; two-thirds consider their sales forces understaffed. Just 11% are overstaffed, and only 23% have staffing levels deemed "just right."

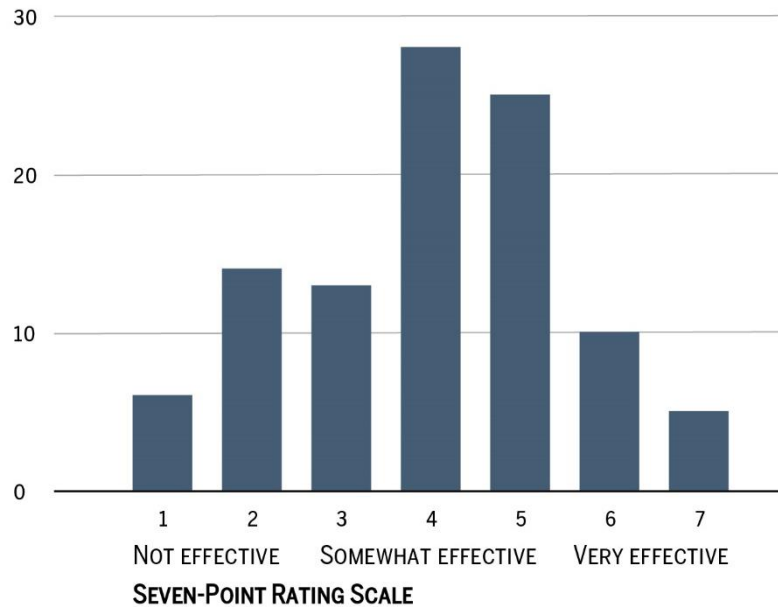


2 ONBOARDING PROGRAMS' IMPACT

2.1.1 ONBOARDING PROGRAM EFFECTIVENESS
FOLLOWS A ROUGHLY BELL-SHAPED DISTRIBUTION AROUND THE MEDIAN RATING OF "SOMEWHAT EFFECTIVE."

OVERALL PROGRAM EFFECTIVENESS

SALES ONBOARDING



2.2 ONBOARDING'S LINK WITH STAFFING AND TURNOVER

Salesperson onboarding affects larger staffing concerns within the firm. We asked respondents for insight into two such issues within their firms – sales force staffing and sales force turnover. We found both were short of optimal levels.

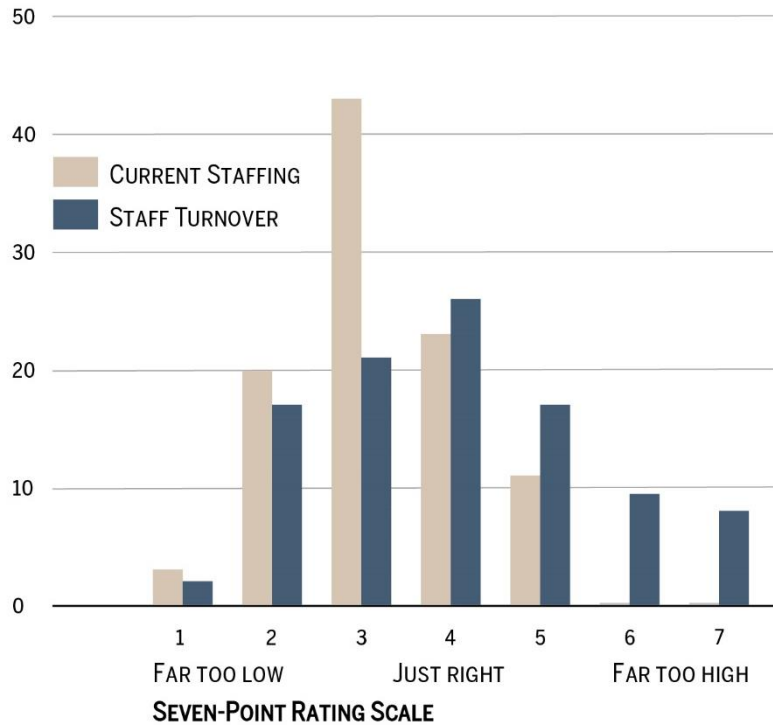
Forty percent of respondents consider firm sales force turnover too low; 26% believe firm sales turnover is optimal; and 34% consider sales force turnover rates too high.



2.2 RESPONDENTS' SALES FORCES ARE UNDER-STAFFED, AND STAFF TURNOVER IS MORE OFTEN "TOO LOW" THAN "TOO HIGH."

SALES FORCE TURNOVER IS OUTPACING STAFFING

PERCENTAGE DISTRIBUTION OF FIRMS



2.3 EXPERIENCE ACCELERATES NEW-HIRE TIME-TO-PRODUCTIVITY

We measured average time-to-productivity for three types of new-hire salespeople: those new to sales as a career, those with sales experience, and those transferred from another department or function within the firm (with or without previous sales experience).

For new-hire salespeople, new to the firm, average time-to-productivity is 10 months. For those with experience, this average time drops to 6.1 months; and for new-hire salespeople transferred into sales from other departments within the firm, average time-to-productivity is 5.4 months.

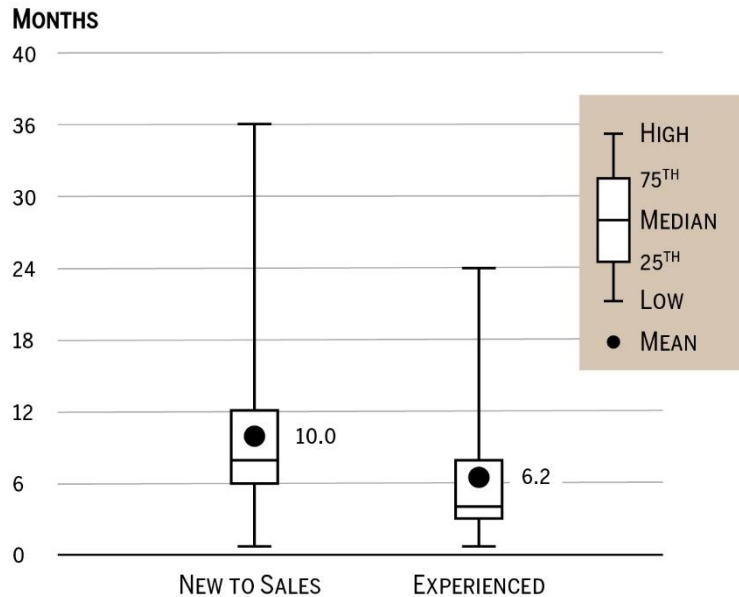
When adjusted for sales force size, time-to-productivity is 8.0 months for new salespeople new to the firm, 5.1 months for experienced hires, and 5.5 months for salespeople promoted or transferred from other departments.

We did not attempt to define “productive” in the context of a productive salesperson, as we assume this represents a highly variable factor across firms.



2.3 NEW-HIRE SALESPEOPLE ARE PRODUCTIVE 40% FASTER, ON AVERAGE, WHEN THEY HAVE PRIOR SALES EXPERIENCE. WHEN ADJUSTED BY SALES FORCE SIZE, TIME-TO-PRODUCTIVITY IS SHORTER (SEE ALSO APPENDIX FIGURE 6.1).

NEW-HIRE SALESPERSON EXPECTED PROFICIENT AFTER ONBOARDING



2.4 SALES ONBOARDING LEAVES MANY SELLING SKILLS UNADDRESSED

After completing an onboarding period (of varying length based on firm), one-third to one-half of sales people lack proficiency in core selling skills. For many of the 12 skills we researched, the portion of salespeople “onboarded” and considered proficient was closer to one-half the population.

Selling skills judged hardest to achieve proficiency in for newly-on-boarded salespeople are reengaging stalled deals (with just 49% of respondents’ salespeople proficient after the onboarding period), selling new products (53%), upselling (54% proficient), closing prospects (54%), and closing deals (without regard to customer type; 54%). New salespeople were most proficient in these skills following onboarding: using internal resources (66%), prospect identification (62%), retaining customers (62%), growing customers (62%), cross-selling (60%), and product mastery (57%).



ONBOARDING SUCCESS BY SELLING SKILL AREA

PERCENTAGE OF SALESPeOPLE PROFICIENT AFTER ONBOARDING



2.4 LESS THAN ONE-THIRD OF SALESPeOPLE WHO COMPLETE THE TYPICAL ONBOARDING PERIOD ARE DEEMED PROFICIENT IN KEY SELLING SKILLS. FIRMS' NEW SALES HIRES WERE LEAST LIKELY TO BE PROFICIENT IN CLOSING PROSPECTS AND REENGAGING STALLED DEALS FOLLOWING ONBOARDING.

3

ONBOARDING PROGRAM PRACTICES

3.1 HOW STRUCTURED ARE ONBOARDING PROGRAMS?

We asked respondents to characterize the degree of structure and consistent application present in their firms' sales onboarding initiatives.

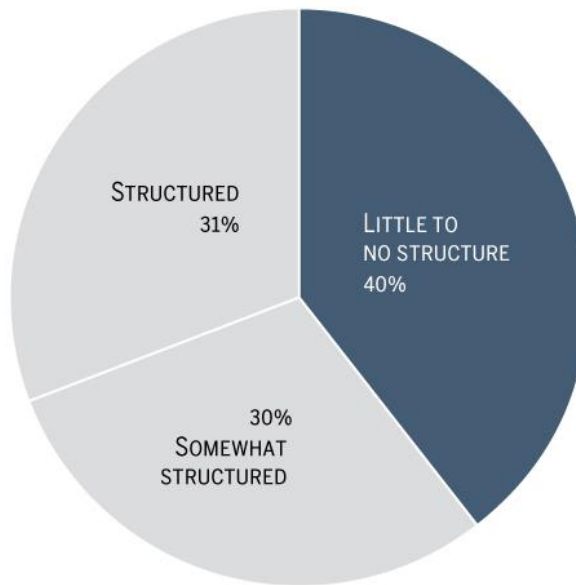
Forty percent of respondents indicate that their onboarding programs had little or no structure (a rating of 1, 2, or 3 on a seven-point scale, where 1 = not at all structured, 4 = somewhat structured, and 7 = extremely structured); 30% judged their programs as "somewhat structured" (a rating of 4), and 31% considered their programs very structured-to-extremely structured (a rating of 5, 6, or 7).



3 ONBOARDING PROGRAM PRACTICES

3.1 ONLY 31% OF RESPONDENTS DESCRIBED THEIR SALES ONBOARDING PROGRAM AS “STRUCTURED.”

HOW STRUCTURED ARE ONBOARDING EFFORTS?
PERCENTAGE OF FIRMS



3.2 HOW CONSISTENTLY APPLIED IS ONBOARDING?

Respondents who indicated their sales onboarding programs were “somewhat structured” or “structured” varied in how consistently they implemented onboarding for new hires. Combined, these two categories comprised 61% of all respondent firms.

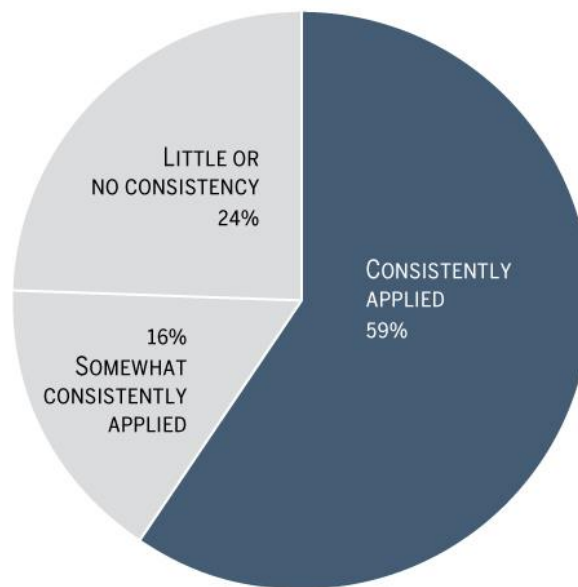
Of these firms, 59% indicated that their program was consistently applied; 16% judged their application “somewhat consistent,” and 24% indicated their onboarding efforts had little or no consistency in application.

In total, firms that are at least “somewhat” structured in their onboarding efforts and at least “somewhat” consistent in their application represent 46% of all respondent firms.



3.2 AMONG FIRMS WITH ONBOARDING PROGRAMS CHARACTERIZED AS "SOMEWHAT STRUCTURED" OR "STRUCTURED" (N=74), 59% ALSO SAID THEIR PROGRAMS WERE CONSISTENTLY APPLIED.

HOW CONSISTENTLY IS ONBOARDING APPLIED?
PERCENTAGE OF FIRMS



3.3 LINKING PROGRAM STRUCTURE AND CONSISTENCY WITH OVERALL PROGRAM EFFECTIVENESS

Onboarding programs' structure and consistency correlate with respondents' rating of overall program effectiveness.

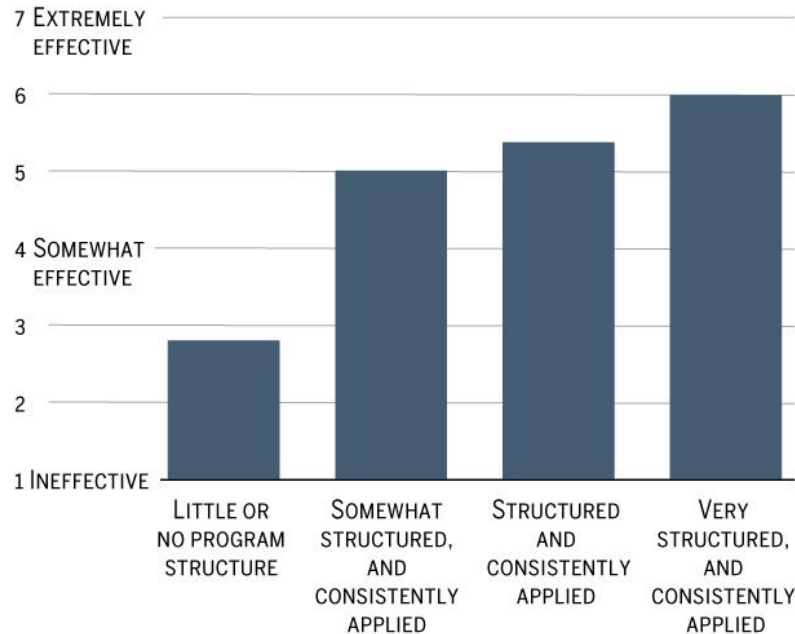
Programs with little-to-no structure were rated 2.8 for overall program effectiveness (on a seven-point scale, where 7 is highest). Programs with a very high degree of structure and consistent application achieved overall effectiveness ratings of 6.3.



3.3 OVERALL SALES ONBOARDING EFFECTIVENESS CORRELATES WITH THE PROGRAM STRUCTURE AND CONSISTENT APPLICATION

STRUCTURE AND CONSISTENCY DRIVE ONBOARDING EFFECTIVENESS

FIRM RATING OF OVERALL ONBOARDING EFFECTIVENESS, SEVEN-POINT RATING SCALE



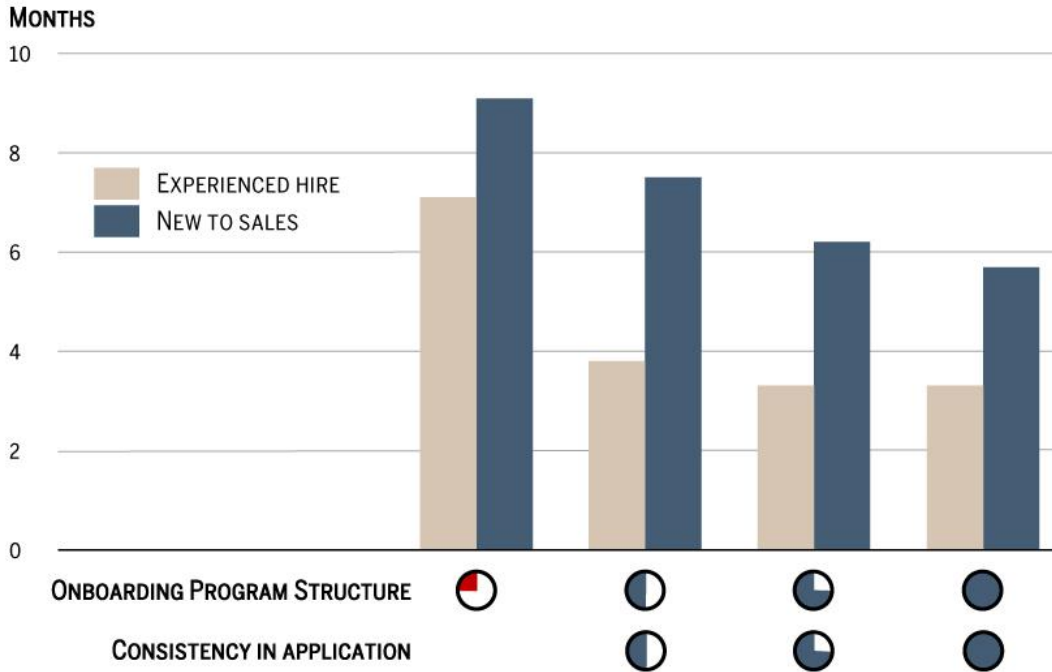
3.4 PROGRAM STRUCTURE AND CONSISTENT APPLICATION SHORTEN TIME-TO-PRODUCTIVITY FOR NEW HIRE SALESPeOPLE

The degree of structure and consistent application present in onboarding programs significantly affects salesperson time-to-productivity. New salespeople, who were also new to sales, at firms with little or no onboarding program structure took 9.1 months, on average, to become productive.

In contrast, firms with highly structured onboarding programs, which were consistently applied, reduced the onboarding period by 37%, to 5.7 months. Similarly, experienced sales hires' time-to-productivity improved by 53% in firms with highly structured, consistently applied onboarding approaches, when compared to firms without (7.1 months' time-to-productivity vs. 3.3 months).



SALESPERSON TIME-TO-PRODUCTIVITY IMPACT OF ONBOARDING PROGRAM CHARACTERISTICS



3.4 FIRMS WITH HIGHLY STRUCTURED ONBOARDING PROGRAMS, WHICH WERE CONSISTENTLY APPLIED, REDUCED THE AVERAGE ONBOARDING PERIOD BY 37%, TO 5.7 MONTHS.

4 IDENTIFYING ONBOARDING CAPABILITY GAPS

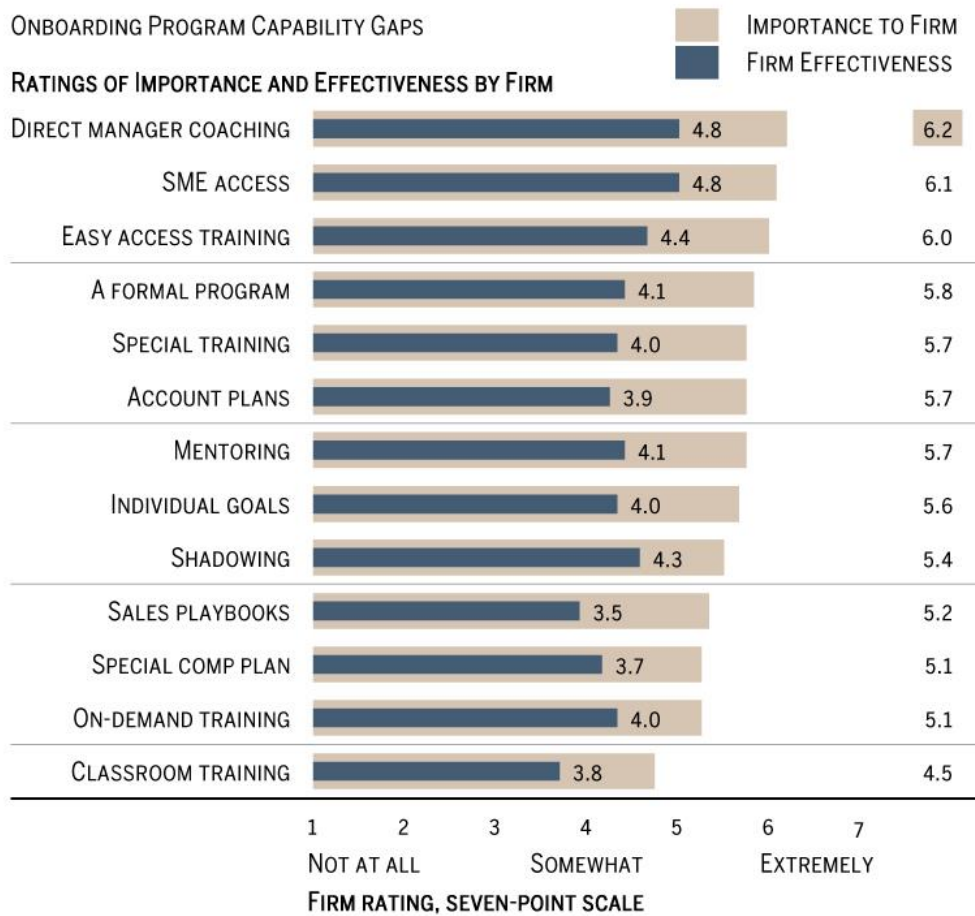
4.1 MANAGEMENT'S ONBOARDING PRIORITIES

Onboarding program elements judged most important by respondents were direct manager coaching (rated 6.2 on a seven-point scale, where 1 = not at all important, 4 = somewhat important, and 7 = extremely important), access to subject matter experts (6.1), easy access to training materials (6.0), the presence of a formal onboarding program (5.8).

Those judged least important (though still rated higher than “somewhat important,” the median value of 4 on a seven-point scale): classroom training (4.5), on demand training (5.1), a special compensation plan (5.1), sales playbooks (5.2), and shadowing experienced salespeople (5.4).



4 IDENTIFYING ONBOARDING CAPABILITY GAPS



4.2 THIS CHART SHOWS MANAGEMENT'S RATINGS OF IMPORTANCE AND PERFORMANCE FOR 13 ONBOARDING PROGRAM ELEMENTS. DIRECT MANAGER COACHING WAS DEEMED THE MOST IMPORTANT PROGRAM ELEMENT, CLASSROOM TRAINING THE LEAST IMPORTANT. FIRMS WERE LEAST EFFECTIVE IN PROVIDING SALES PLAYBOOKS, MOST EFFECTIVE IN PROVIDING COACHING AND ACCESS TO SUBJECT MATTER EXPERTS (SMES). (FOR A CHART DISPLAYING VARIANCE BETWEEN THESE TWO RATINGS AS A SINGLE VALUE, SEE APPENDIX FIGURE 6.2.)

4.2 MANAGEMENT'S RATINGS OF PROGRAM EFFECTIVENESS

For each onboarding program element included in the importance ratings above, we also asked respondents to rate their firm's current effectiveness. Firms were most effective at providing access to subject matter experts (rated 4.8 on a seven-point scale, where 1 = not at all effective, 4 = somewhat effective, and 7 = extremely effective), manager-to-salesperson coaching (4.8), providing easily accessible training materials (4.4), allowing new salespeople to shadow experienced salespeople (4.3), and establishing a formal onboarding program (4.1). Firms were least effective at providing sales playbooks (3.5), developing unique compensation plans for new salespeople (3.7), classroom training (3.8), and developing account plans (3.9).



4.3 **PROGRAM CAPABILITY GAPS**

We calculated the difference between respondents' ratings of importance and firm effectiveness. The delta between these two ratings represents a capability gap. Onboarding capability gaps were all negative – that is, ratings of firm performance were all lower than importance ratings for each onboarding program element. This suggests that all aspects of onboarding programs – for our respondents as a whole – underperformed expectations to some degree.

Developing new salesperson account plans had the largest capability gap, with a variance of -1.8 (the delta between an importance rating of 5.7, and a current firm performance rating of 3.9, each on a seven-point scale, where 7 = extremely important/effective).

Other notable gaps, in descending order of magnitude, are special new salesperson training (-1.8), a formal onboarding program (-1.7), sales playbooks (-1.7), and easily accessible training materials (-1.6).

4.4 **PLOTTING MANAGEMENT'S IMPROVEMENT PRIORITIES**

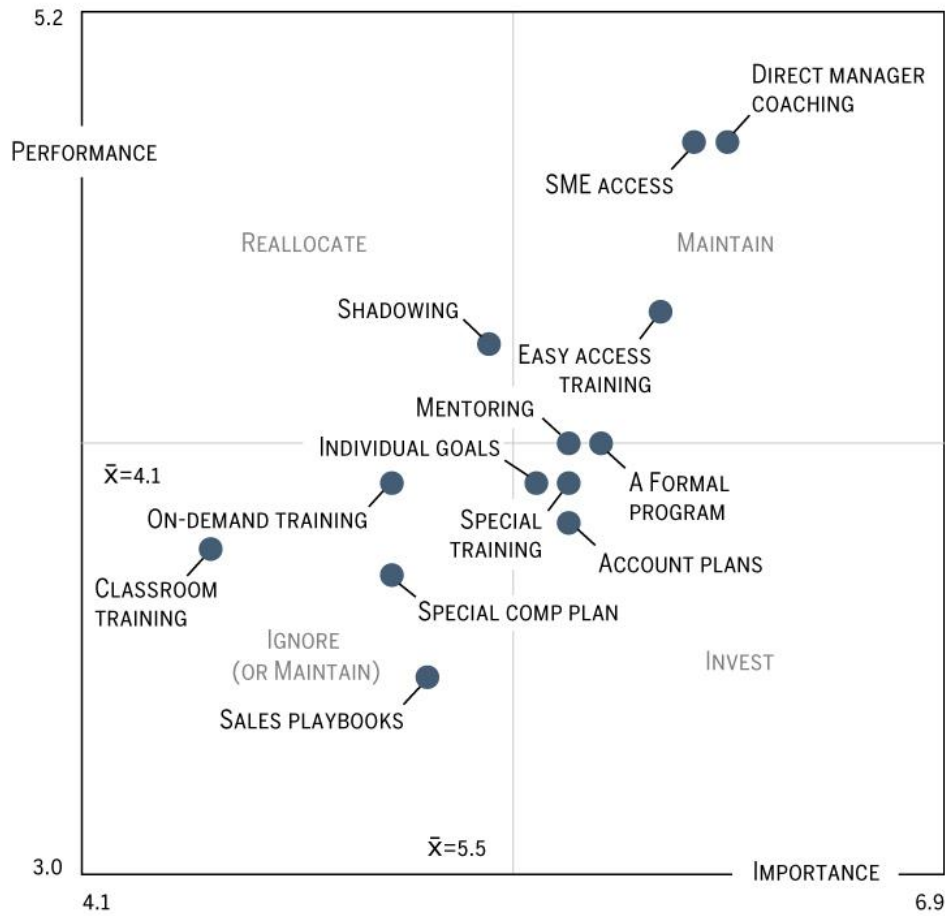
A cluster of onboarding program elements represent management's highest priorities for improving onboarding. These are: defining a formal onboarding program, specialized training for new salespeople, establishing mentoring programs, developing account plans for new salespeople, and defining individualized performance goals. We identified these priorities after force ranking importance and performance ratings for all onboarding program elements, and plotting them on an x-y scatterplot.

Elements in the priority cluster are those in the lower right quadrant, and rated above the mean value for importance (5.5 on a seven-point scale, where 7 = most important), and below the mean rating for current firm performance (4.1 on a seven-point scale, where 7 is highest performance).



4 IDENTIFYING ONBOARDING CAPABILITY GAPS

PLOTTING MANAGEMENT'S ONBOARDING PRIORITIES



4.4 IMPORTANCE-EFFECTIVENESS MATRIX. WE PLOTTED MANAGEMENT'S RATINGS OF IMPORTANCE AND FIRM EFFECTIVENESS FOR ALL ONBOARDING PROGRAM COMPONENTS. THE RESULTING SCATTER PLOT OFFERS A FORCED-RANKING OF PRIORITIES FOR IMPROVEMENT.



4.5 CORRELATING ONBOARDING EFFECTIVENESS AND FIRM PERFORMANCE

Organizations with effective sales onboarding sales programs performed better than organizations without, in three measures: annual firm sales revenue growth, achievement of annual firm sales objective, and achievement of annual firm profit objective.

Our research quantified that firms with effective onboarding programs achieved 14% better results in sales and profit objective achievement, and 10% improvement in annual firm sales growth.

ONBOARDING PROGRAM EFFECTIVENESS AND FIRM PERFORMANCE

CHANGE IN FIRM PERFORMANCE (VARIANCE FROM MEAN)



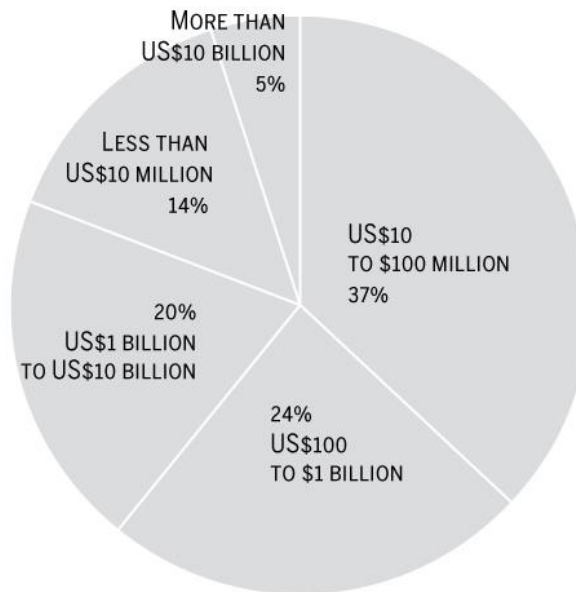
4.5 EFFECTIVE ONBOARDING PROGRAMS CORRELATE WITH FIRM PERFORMANCE ADVANTAGES OF BETWEEN 10 AND 14%. ALSO SEE APPENDIX 6.4.



5

RESPONDENT DESCRIPTIVE INFORMATION

RESPONDENT FIRM SIZE
PERCENTAGE OF FIRMS, \$US



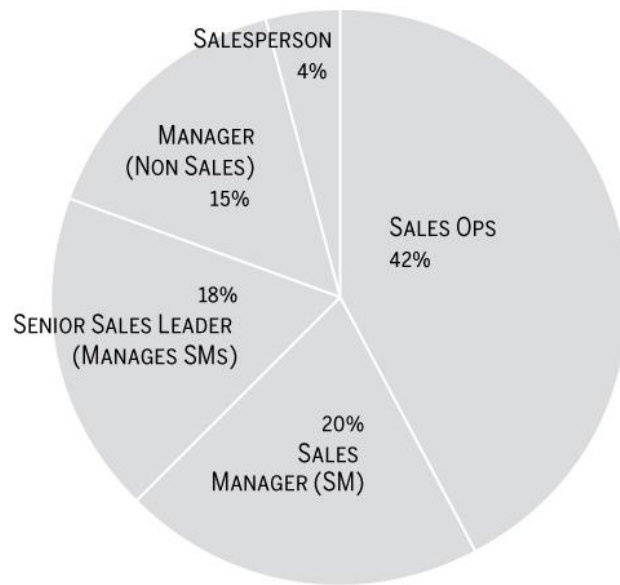
5.1 RESPONDENT FIRM SIZE

5.1 FIRM SIZE

Seventy-seven participating firms ranged in size from small to very large. Forty-nine percent of respondents' firms had annual revenue in excess of US\$100 million; 5% were firms with annual revenues in excess of US\$10 billion.



RESPONDENT JOB ROLE
PERCENTAGE OF RESPONDENTS



5.2 RESPONDENT JOB ROLE

5.2 JOB ROLE

Respondents are predominately sales operations leaders in their firms. Twenty percent of respondents are first-line sales managers (i.e., they directly manage salespeople). An additional 18% are senior sales leaders, managing sales managers. Fifteen percent are in non-sales-related management positions, and 4% are salespeople.

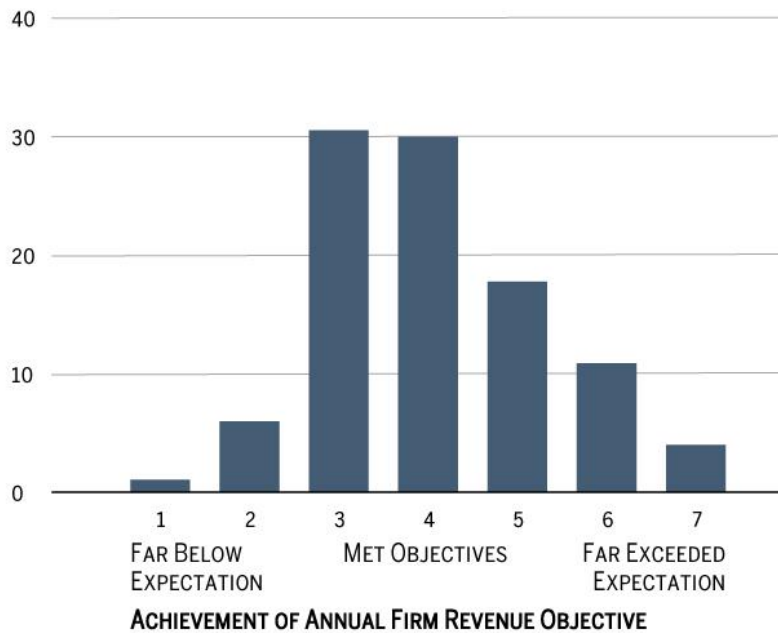


5 RESPONDENT DESCRIPTIVE INFORMATION

5.3.1 RESPONDENT FIRM SALES OBJECTIVE ACHIEVEMENT

ANNUAL FIRM REVENUE OBJECTIVE ACHIEVEMENT

PERCENTAGE DISTRIBUTION



5.3 FIRM PERFORMANCE

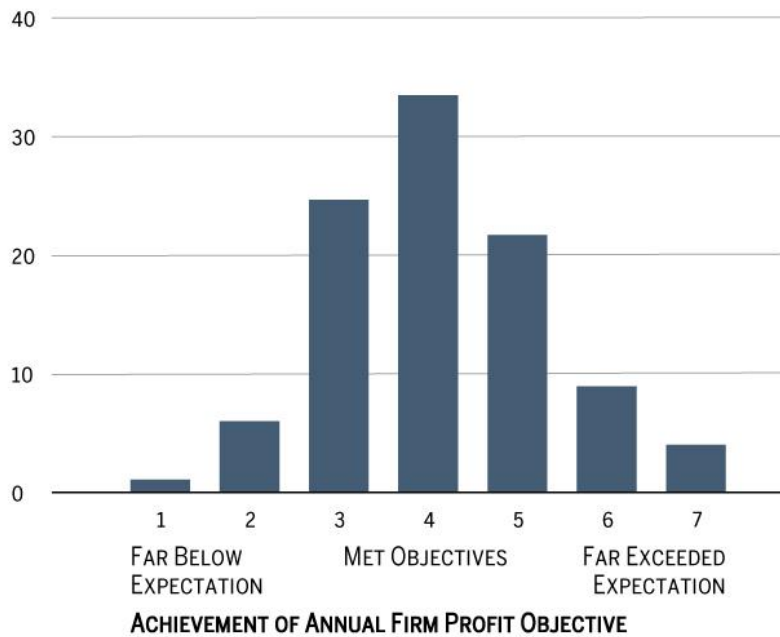
Eighty-six percent of respondent firms met or exceeded firm sales objectives in the preceding 12 months, and 69% met or exceeded profit objective in the same period. Respondents were asked to rate their firm's achievement of profit and sales objective based on a seven-point scale ("1" for far underachieved objective; "4" for met objective; "7" for far exceeded objective). We use this performance rating approach in order to normalize company performance across large and small firms, and high and moderate growth sectors. Thirteen percent of respondents rated profit objective achievement in the highest two categories ("6" or "7"); 39% of firms rated sales objective achievement in the highest two performing categories. Seventy-two percent of respondent firms had positive revenue growth in the preceding 12 months. Fourteen percent had flat revenues, and 14% experienced declining firm revenues.



**5.3.2 RESPONDENT
FIRM PROFIT OBJECTIVE
ACHIEVEMENT**

ANNUAL FIRM PROFIT OBJECTIVE ACHIEVEMENT

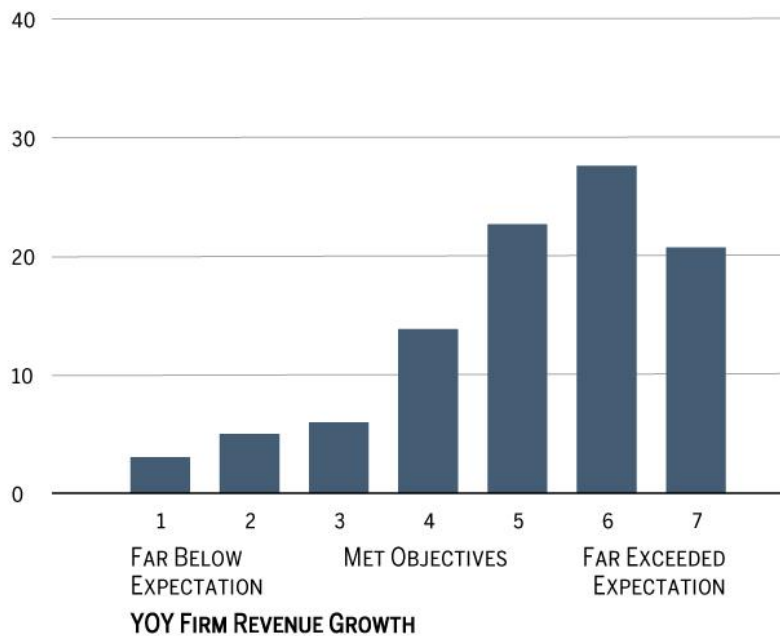
PERCENTAGE DISTRIBUTION



**5.3.2 RESPONDENT
FIRM ANNUAL SALES
GROWTH**

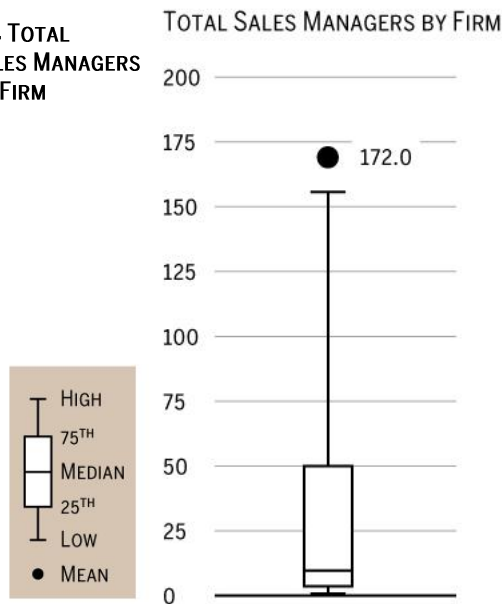
YEAR-OVER-YEAR FIRM REVENUE GROWTH

PERCENTAGE DISTRIBUTION



5.4 SALES FORCE SIZE, STRUCTURE, AND MANAGEMENT SPAN OF CONTROL

5.4 TOTAL SALES MANAGERS BY FIRM

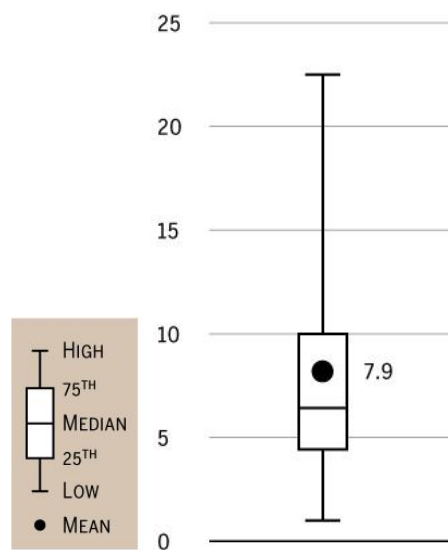


Respondents firms have an average of 172 sales managers, and 1,295 salespeople; sales managers have 7.9 direct-report salespeople on average by firm; when calculated in aggregate, management span-of-control is 7.8.

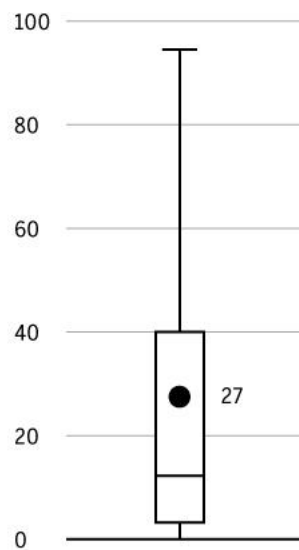
Corresponding median values are 82.5 salespeople per firm, 8 managers per firm, and a salesperson-to-sales manager ratio of 6.7:1.

Twenty-seven percent of respondent firms' salespeople were inside sales; the median value by-form was 12.5%. In aggregate, 36% of all salespeople in respondent firms were inside salespeople.

RATIO OF SALESPEOPLE TO SALES MANAGERS, BY FIRM



INSIDE SALESPEOPLE AS A PERCENTAGE OF TOTAL SALES HEADCOUNT, BY FIRM



5.4.1 TOTAL RATION OF SALESPEOPLE TO SALES MANAGERS, BY FIRM

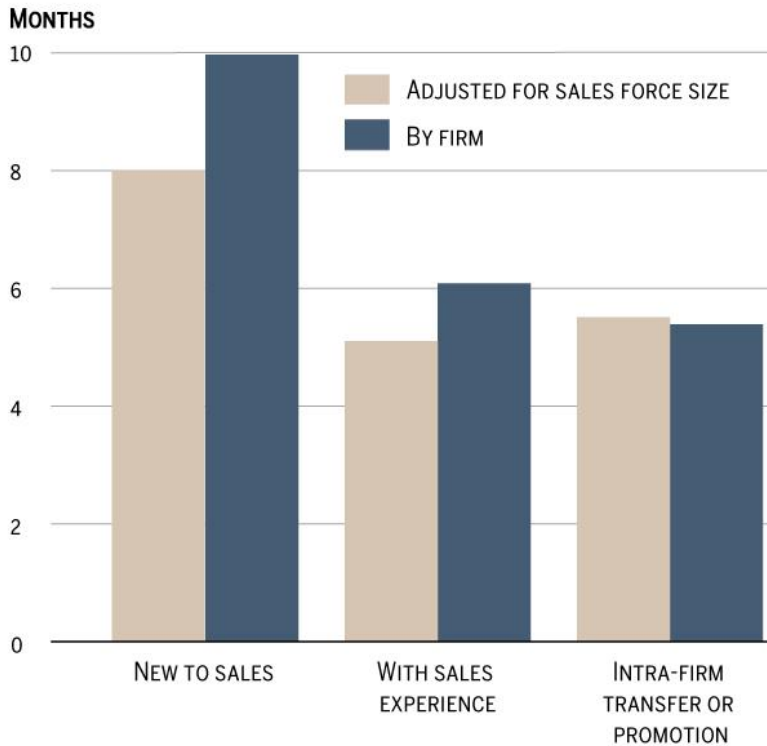
5.4.2 INSIDE SALESPEOPLE AS A PERCENTAGE OF TOTAL SALES HEADCOUNT, BY FIRM



6 APPENDIX

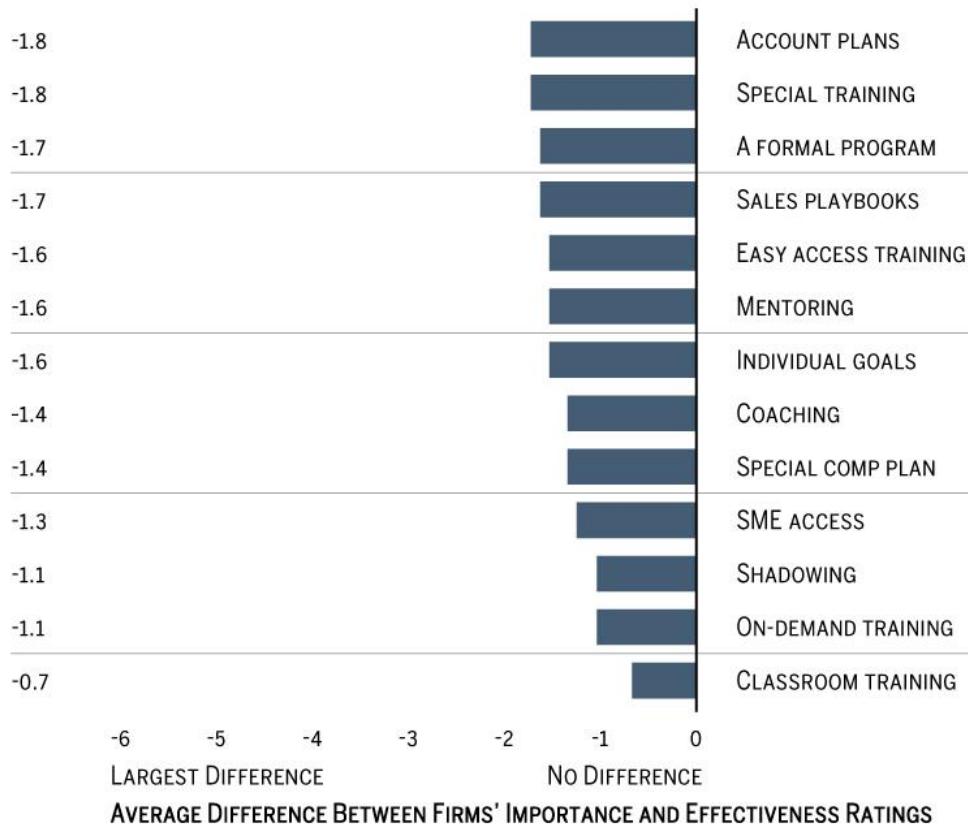
6.1 AVERAGE TIME-TO-PRODUCTIVITY FOR A NEW HIRE SALESPERSON, NEW TO SALES, IS 8.0 MONTHS WHEN ADJUSTED FOR SALES FORCE SIZE. BY FIRM, NEW-HIRE SALESPERSON NEW TO SALES TAKE 10 MONTHS TO BECOME PRODUCTIVE.

NEW SALESPERSON TIME-TO-PRODUCTIVITY



ONBOARDING PROGRAM CAPABILITY GAPS

VARIANCE IN EFFECTIVENESS AND IMPORTANCE RATINGS



6.2 VARIANCE IN RESPONDENTS' RATINGS OF "IMPORTANCE" AND "PERFORMANCE" FOR SALES ONBOARDING PROGRAM ELEMENTS. A POSITIVE RATING REFLECTS ELEMENTS WHERE PERFORMANCE EXCEED RATED PERFORMANCE. A NEGATIVE RATING REFLECTS ELEMENTS WHERE PERFORMANCE LAGS IMPORTANCE. ELEMENTS WITH THE LARGEST NEGATIVE VALUES (I.E., THE LOWEST NUMERICAL VALUE) REFLECT THOSE MOST UNDERPERFORMING. ALL ELEMENTS HAD NEGATIVE VARIANCES BETWEEN IMPORTANCE AND PERFORMANCE RATINGS.



RESEARCH BRIEF: SALESPERSON ONBOARDING

ONBOARDING PROGRAM EFFECTIVENESS AND FIRM PERFORMANCE

FIRM PERFORMANCE



6.3 EFFECTIVE ONBOARDING PROGRAMS CORRELATED WITH FIRM PERFORMANCE ADVANTAGES OF BETWEEN 10 AND 14%. THESE RESULTS ARE NOT ADJUSTED FOR SALES FORCE SIZE.

