



WORKRAMP

The Ultimate Sales **Onboarding** **Playbook**

How to set up your new hires for success

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Preface

It's crucial to have an impactful onboarding program to maximize the opportunities it affords. That includes a lot of moving parts; it isn't a static experience that allows you to "check a box" and say it was done. We are going to explore all of those moving parts and share examples along the way to help you map out your program.

This ebook is designed to help you craft a sales onboarding program that will level up your new hires' experiences and put them on the path to success.

What You'll Learn:

- 1 Understand the impact of onboarding and your best levers.
- 2 How to design the right curriculum to achieve your training outcomes.
- 3 Top blended learning strategies to maximize knowledge retention.
- 4 12 key sales metrics to help measure the success of your onboarding program.



CHAPTER 1

Impact of Onboarding

“Effective training starts at the end.”

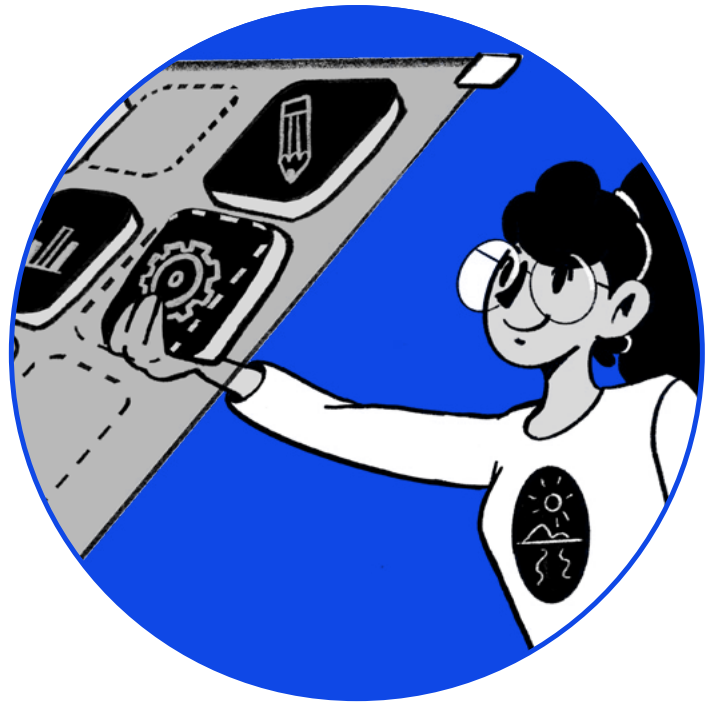


Effective Training Starts at the End

In order to build an effective training program, you must be able to paint a clear picture of what you want your learners to achieve. You should then work backwards to determine how you'll help them achieve your training outcomes.

How onboarding can change the new hire experience:

- Allow new hires to hit the ground running
- Increase the level of enthusiasm for your team
- Quicken new hire's ability to assimilate and feel like a "part of the team"
- Improve employee engagement and retention rates



By using feedback surveys regularly throughout the onboarding process, you can assess and predict which employees will be the most engaged, productive, and tenured.



You can build an effective onboarding program if the new hire:

- Knows what is expected of him/her at work
- Have the materials and equipment to succeed at work
- Have the opportunity to bring his/her best self to work, to learn, and grow
- Regularly receive recognition for good work
- Has a manager and/or teammates that care about him/her as a person
- Has someone at work who's invested in his/her development
- Feels that his/her opinions count

As you're building your onboarding program, make sure you take the time to address each of these points!



CHAPTER 2

Identifying Your Building Blocks

Never assume a new hire knows anything.



The most critical pieces of building an onboarding strategy are:

- 1 Internal alignment on training outcomes
- 2 Access to necessary tools

To determine training outcomes, you must think:

*“What are some **core competencies** that a new hire needs to master to be successful in their roles?”*

What can we deliver in 1-2 weeks to maximize this impact?”

For most teams, core competencies include:

- Basic product knowledge
- Product & corporate messaging
- Understand cross-functional team relationships
- Core, role-specific skills

Rule #1: **Never assume that a new hire knows anything**

The best way to set new hires up for success is to **proactively provide context and clarity on everything** that's introduced in the first few weeks.



New hires want to be perceived as competent and may avoid asking seemingly basic questions that may negate that perception. But with the introduction of every concept, you must do your best to always add a sentence or two that will **maximize their clarity vs leaving out details** that may leave someone confused and frustrated.



When designing a new hire onboarding program, consider adding a few additional goals:

- Develop role-specific pathways for each Go-To-Market role
- Track metrics and KPIs to prove onboarding effectiveness
- Standardize as much as possible
- Add an experiential learning component
- Scope a future hybrid onboarding model

The screenshot shows a sidebar on the left with the title 'Logistical Onboarding: All' and a welcome message. The main content area is titled 'Access to Systems & Accounts' and includes a 'Welcome to the team!' message. Below this, there is a checklist titled 'Access to Box's Systems (includes having logged in already)*' with items like 1Password, G-Suite, Lever (ATS), Gusto, Notion, Slack, Zoom, and a demo space.

Logistical Onboarding: All
Welcome! Let's get the logistics out of the way...
⌚ 15m

Let's Get Started!

- Access to Systems & Accounts

Employee Handbook & Key Practices

- Benefits
- Remote Work Philosophy
- Holidays & PTO
- Employee Handbook & Policies

Wrap Up

- Join the Social Squad
- Next Steps

Access to Systems & Accounts

Welcome to the team!
We're so excited you're here!

Let's get the boring, necessary stuff out of the way. You should already have most of this setup, but just in case...

Go through the checklist below and actively check that you have access to/have properly set up each item listed. Take note of anything that is missing or not working properly and chat with your supervisor ASAP.

Access to Box's Systems (includes having logged in already)*

- ☐ 1Password (securely store and share passwords)
- ☐ G-Suite (email, calendar, etc.)
- ☐ Lever (ATS)
- ☐ Gusto (employee payroll and benefits)
- ☐ Notion (library of all company documents)
- ☐ Slack (internal communication/chat/messaging)
- ☐ Zoom (virtual meetings)
- ☐ Your Demo Space (your own Box account)

Sample employee onboarding guide in WorkRamp

Get help building an effective onboarding program.

Learn More



Once you determine the core competencies your new hire must master to excel in his/her role, map out your list to 'buckets' or categories.

Here's a sample list of core competency buckets that sales reps may need to master foundational skills during their Sales Onboarding Program:

- Use Cases
- Product Knowledge
- Pricing + Value
- Corporate Messaging
- Meet the Team
- Tools Training
- Soft Skills

After identifying your buckets:

- 1 Determine the priority order of these buckets
- 2 Figure out what new hires should know about each bucket now vs what can be learned later
- 3 List potential training topics for each bucket
- 4 How much time needs to be spent to master each bucket



Sample Go-To-Market Onboarding Curriculum at Box



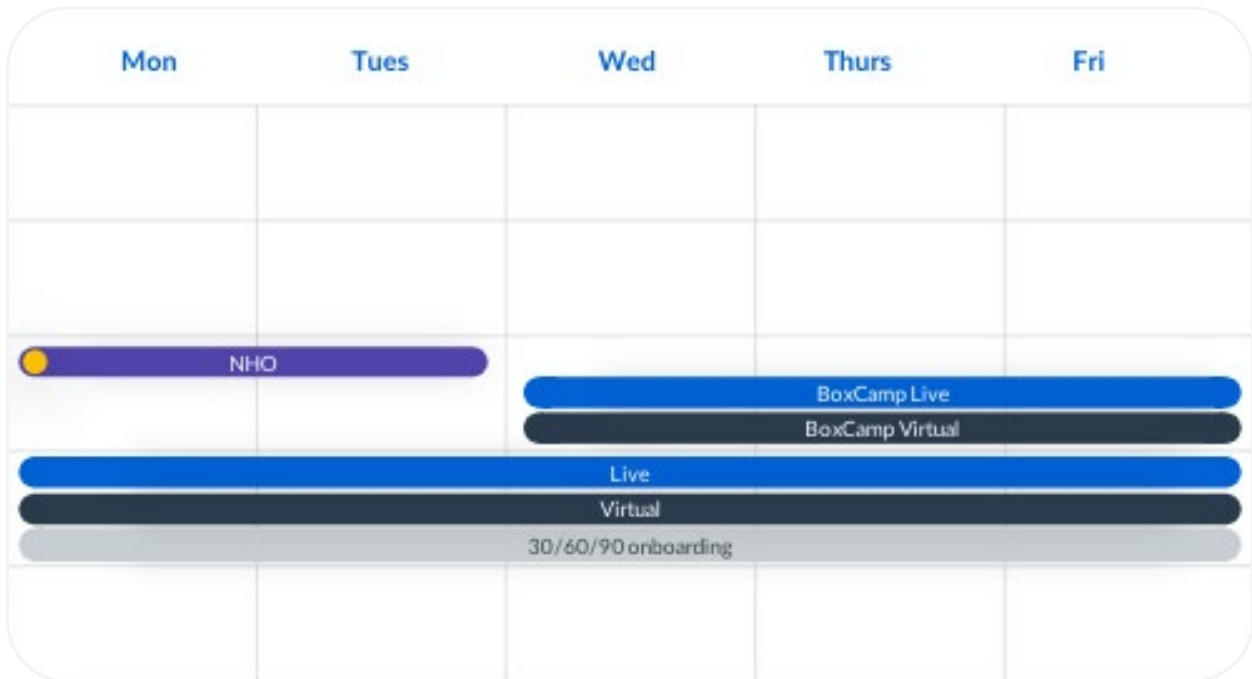
CHAPTER 3

Determining the Right Format

Meet the learners where they are



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Here's a checklist to help you decide which format to use:

	Live Classroom Training	LMS (WorkRamp)
BEST SUITED FOR...	<p>The topic is extremely complicated or has a ton of detail</p> <p>New hires often have a lot of questions around the content</p> <p>It's better delivered with a human touch (ie company culture)</p>	<p>Serves as a prerequisite to a live session</p> <p>Content is mostly static and doesn't constantly change</p> <p>Training can be built in a dynamic matter to keep learners focused</p> <p>Need to assess learner retention (post-session guide)</p> <p>Content can be recycled for multiple uses and delivered to other groups</p>
EXAMPLES	<p>Company Culture</p> <p>Product Demo Training</p> <p>Interactive workshops with panels and guest lectures</p>	<p>IT Onboarding Checklist</p> <p>Product Demo Certification</p> <p>Sales tools training</p>

Learn how we make onboarding easier and reduce time-to-quota by 33% with WorkRamp.

[Learn More](#)



The Blended Learning Approach



Example of a 90-day sales manager onboarding schedule

Use a blended learning approach to design an impactful onboarding program:

- Leverage live, instructor led sessions to build team camaraderie and lead highly interactive learning sessions.
- Leverage learning, gamification, and assessment tools in a modern LMS like WorkRamp to maximize knowledge retention.



The best onboarding programs include a mix of live training and self-paced learning opportunities that are delivered through a modern LMS like WorkRamp.



6 Key Tips for a Successful Onboarding Program:

- 1 Self-paced learning (LMS) can set the stage for live training and pre-teach technical skills around using sales tools so that learners don't feel overwhelmed with too much information at the live session.
- 2 Creating bite-sized videos, challenges, and learning guides that require a low time commitment—each intended to take just 10 or 15 minutes to complete—can greatly optimize the value of your LMS.
- 3 Be more intentional about building online training content that serves to teach specific core competencies, rather than offloading as much content as possible about a given topic.

*“At first, we offered too much self-serve content. Our salespeople are some of the busiest people in the organization, so our instinct was to offer an abundance of self-serve e-learning. **Though the intention was to create self-paced learning options, the amount of content was too overwhelming and engagement suffered.** Learners loved the training guides that were offered, but they just didn't have the time to look at everything.”*

— Rich Adams at Zoom

- 4 You can kickoff with a training guide in LMS to get the conversation started, then follow up with live workshops or virtual training sessions. This allows learners to have foundational learning so that no one is starting from scratch.
- 5 Live workshop sessions should be scheduled throughout the onboarding process, and must be hands-on & highly personalized to the topic at hand to encourage group participation.
- 6 Balancing live and on-demand training is very much a work in progress and it's going to look different at every company. The best way to achieve the right balance for your team is to tune into learner needs and engagement. **Meet learners where they need you.**



Epilogue

New hire onboarding doesn't end once the initial training is complete and employees are ramping up on their day-to-day duties.

Formally, most onboarding programs last at least 90 days to allow:

- Continued learning opportunities to reinforce skills taught
- Clear benchmarking of their 30/60/90 day progress
- Check-in's to measure proficiency & provide coaching opportunities
- Ongoing culture assimilation activities
- Insight and feedback meetings on program development



At the 90 day mark, you should hold an Insight Meeting to make sure that the onboarding program is delivering on all of the training outcomes.

Questions you should ask are:

Have we delivered on the training objectives outlined at the start?

Is there anything that we could be doing better in the first 90 days?

Knowing what you know now, is there anything you wish you knew on Week 1? Month 1? Month 2?



It's also important to set measurable goals and track learner metrics to ensure that your onboarding program is effective.



Role	Sample Metrics to Measure Onboarding Success
All Sales	LMS course completion rates LMS certification grades Time to achieve quota Survey feedback score Time to generate his/her own pipeline
SDR	Time to first opportunity or meeting booked
AE	Time to first \$XXk deal (based on size or scope of ACV) Time to first deal Time to second deal Delta between time to first and second deal Time to first opp creation Time to first deal (net new business vs expansion)

Onboard with the Best

Learn more about how **WorkRamp** enables top performing **sales teams** at Reddit, Outreach, and Box.

[Request a Demo](#)

