

# SALES ONBOARDING ACCELERATING NEW HIRE PRODUCTIVITY

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*MindTickle!*★

## **SALES ONBOARDING: ACCELERATING NEW HIRE PRODUCTIVITY**

- #1 Discuss components of a best-in-class Onboarding Program
- #2 Measure and monitor key Performance Indicators of new hires
- #3 Use best practices to improve Onboarding Effectiveness

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**Mind***Tickle!* 

A comprehensive sales readiness platform for inside sales, field sales, and partner enablement — Onboard. Coach. Reinforce. Update.

Proven high adoption. Trusted as the strategic sales enablement partner by companies, like AppDynamics, CrowdStrike, MongoDB, Nutanix, Qualtrics, and many more.



## Mohit Garg

Co-Founder & CRO, MindTickle

Mohit Garg is the co-founder of MindTickle, a SaaS platform for sales readiness. Mohit is responsible for the company's marketing and sales initiatives across North America and Europe. He previously held senior positions in management consulting at Diamond Management & Technology Consultants and PwC. He has extensive experience in building product companies and a proven track record in Silicon Valley startups, including Aruba Networks and Iospan Wireless.



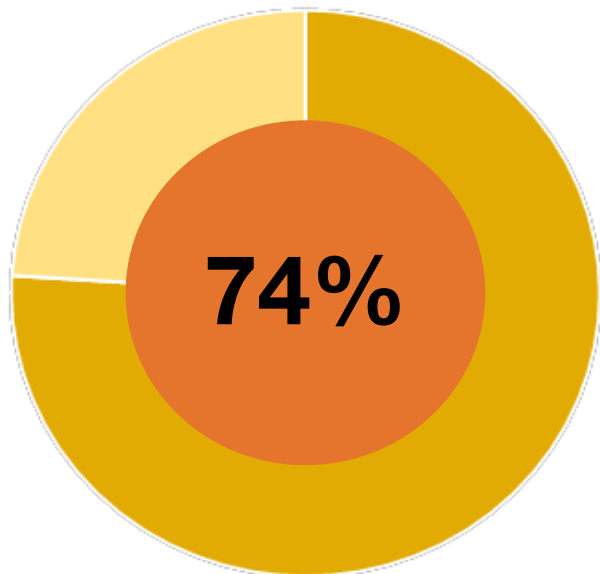
## Tracy Meersman

Director of Sales Enablement, CrowdStrike

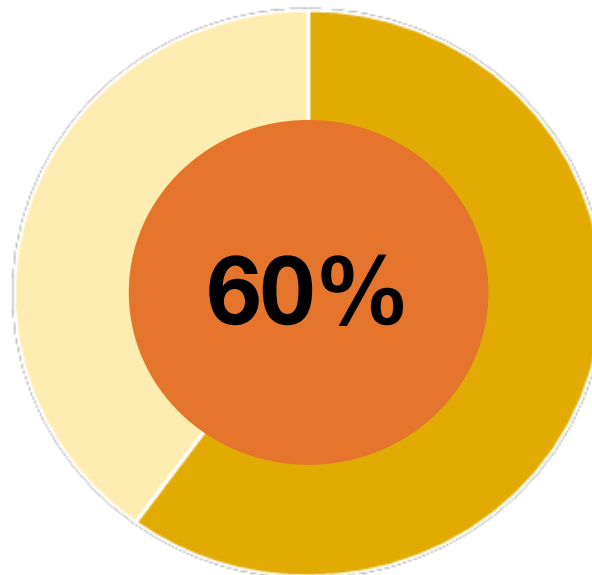
Tracy Meersman is the director of learning and sales enablement at CrowdStrike, one of the fastest-growing technology companies in Silicon Valley. She previously led sales enablement at Intel Security, Perquest, EMC, and ADP and has extensive experience in solving complex sales onboarding and training challenges. She is passionate about helping others exceed their potential.

# Driving Business Impact Through Next-Gen Sales Onboarding

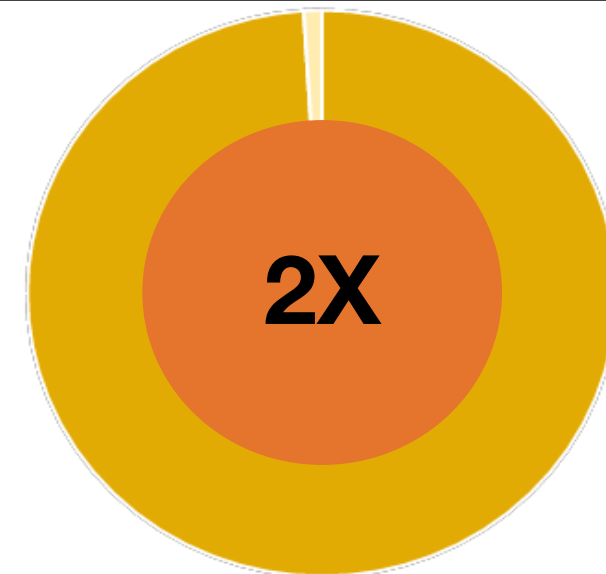
# State of the Industry - Continued



Companies have a formal Sales Onboarding Program



Faster ramp up of sales hires who go through a structured Sales Onboarding Process



More topline revenue per rep earned by companies with an Agile and Structured Onboarding Process

Source: Multiple Analyst Reports, MindTickle survey of 50+ fast growing tech companies

# Here are a few real-life examples of results achieved

**Hyper-growth companies such as CrowdStrike and other tech Unicorns that implement a well-designed Onboarding program achieved the following results\***

- Reduced new hire ramp time by up to 58%
- Reduced time to first \$50K sale from 192 days to 85 days
- Improved revenue from rep with < 12 months tenure by 21%
- Improved new hire pipeline at 180 day mark by 19%

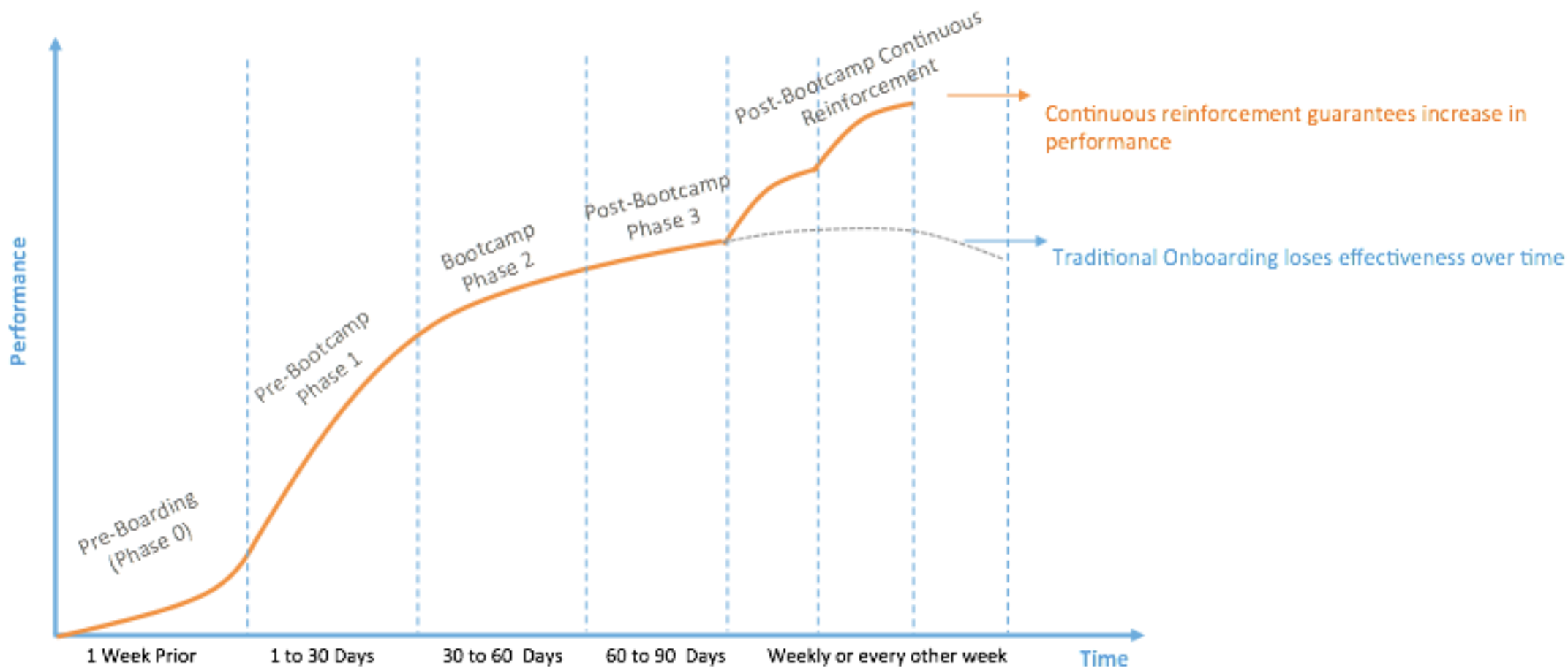
\*Source: MindTickle data – real results from a broad range of customers



# CrowdStrike: How we onboard our new sales reps

# SALES ONBOARDING AT CROWDSTRIKE

## The Big Picture



# SALES ONBOARDING AT CROWDSTRIKE

IS

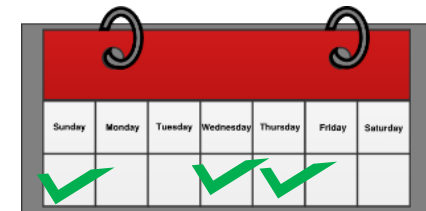
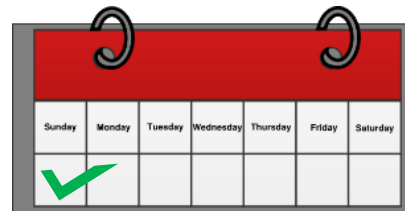
- PERSONALIZED

The screenshot displays the 'Sales Academy' Learning Board interface. At the top, there are navigation tabs for 'Learning Board' and 'Content Files', along with user profile, notification, and email icons. The main content area is titled 'First 30 Days - EAE' and includes filters for 'Completion Status - All' and 'Content Type - All', along with a search bar. A sidebar on the left lists 'My Board' items: Pre-Boarding, Pre-Bootcamp, Bootcamp, First 30 Days - EAE (selected), 31 - 60 Days - EAE, 61 - 90 Days - EAE, Refreshers, and Product Updates. The main grid contains eight course cards, each with a 'WEEK 1' calendar icon and a 'START →' button. The cards are: 'Month 1 Objectives - EAE', 'Week 1 Checklist - EAE' (with a checklist icon), 'Industry Overview', 'Product Training', 'Buyer Persona', 'Use Cases', 'Navigating Xactly', and 'Elevator Pitch' (with a 'Mission' tag).

# SALES ONBOARDING AT CROWDSTRIKE

IS

- Personalized
- **SCALABLE**



# SALES ONBOARDING AT CROWDSTRIKE

## IS

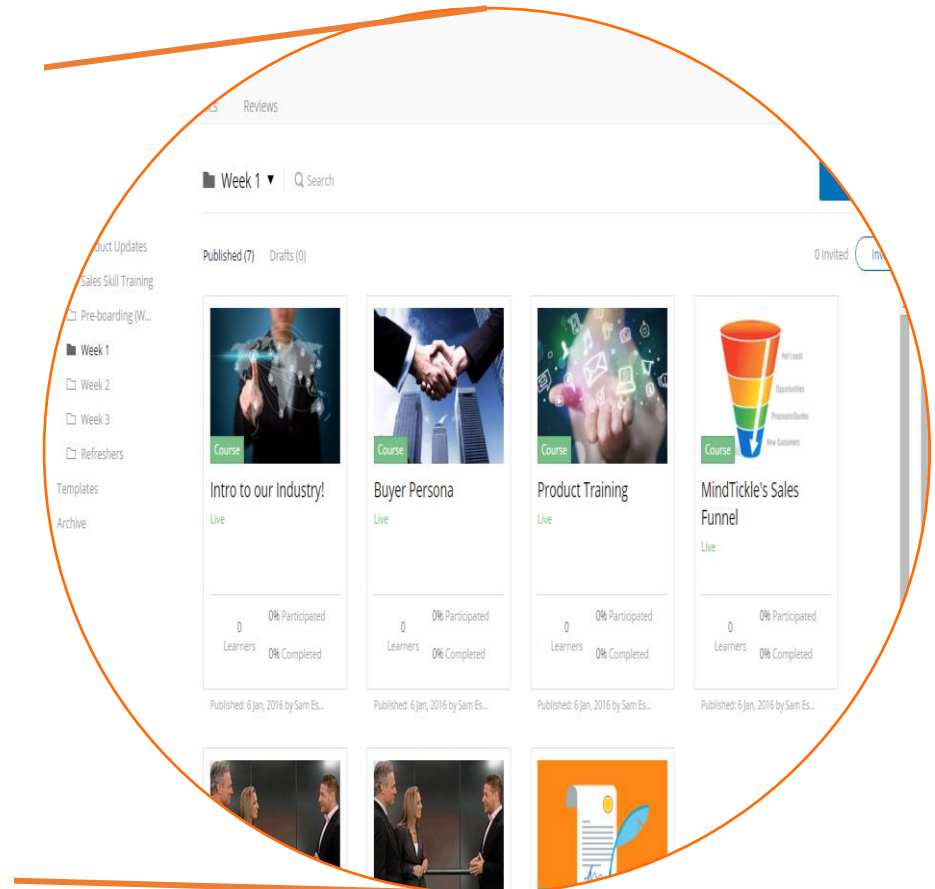
- Personalized
- Scalable
- **STRUCTURED & MILESTONE BASED**

## My Board

### The first 30 Days!

- Welcome to CrowdStrike
- Intro to our Industry!
- Buyer Persona
- Product Training
- + 5 More

[VIEW →](#)



# SALES ONBOARDING AT CROWDSTRIKE

## IS

- Personalized
- Scalable
- Structured & milestone based

- **COMPREHENSIVE WITH BLENDED LEARNING & ACTIVITIES**

**Pricing Pitch**

PRACTISE & SUBMIT REVIEWS TOP SUBMISSIONS

Target Length - 1:00 m

**Submit a 1 min opening pitch in response to the scenario described below:**

You received a 'Request for Demo' from 'Michelle Clara, Sales Manager, Acme Corp, Boston. Your 30 mins online demo with her is scheduled for tomorrow.

Certificate Cut-Off: 3.5/5

Evaluation Parameters:  
Knowledge Clarity Confidence Enthusiasm

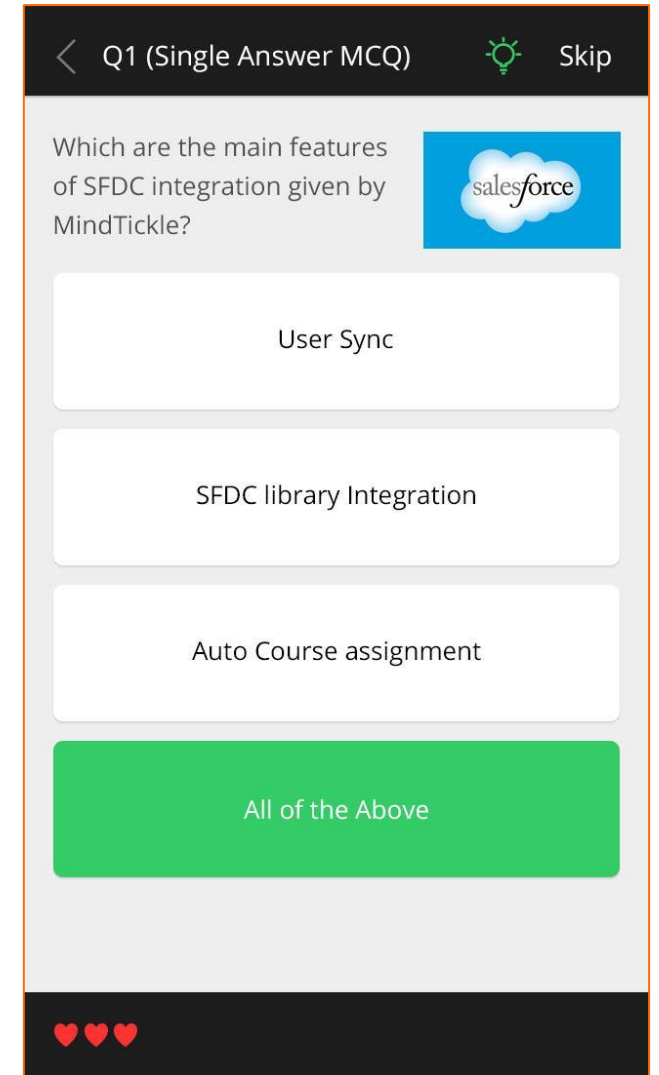
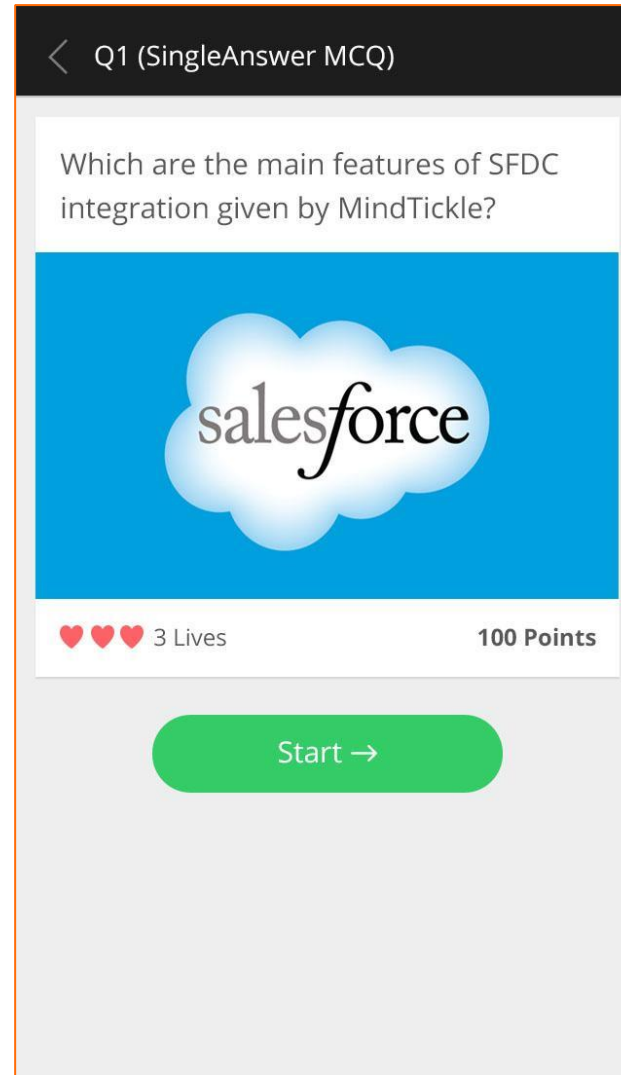
Start recording

# SALES ONBOARDING AT CROWDSTRIKE

## IS

- Personalized
- Scalable
- Structured & milestone based
- Comprehensive with blended learning & activities

- **INCLUSIVE OF RECALL & REINFORCEMENT**



# SALES ONBOARDING AT CROWDSTRIKE

## IS

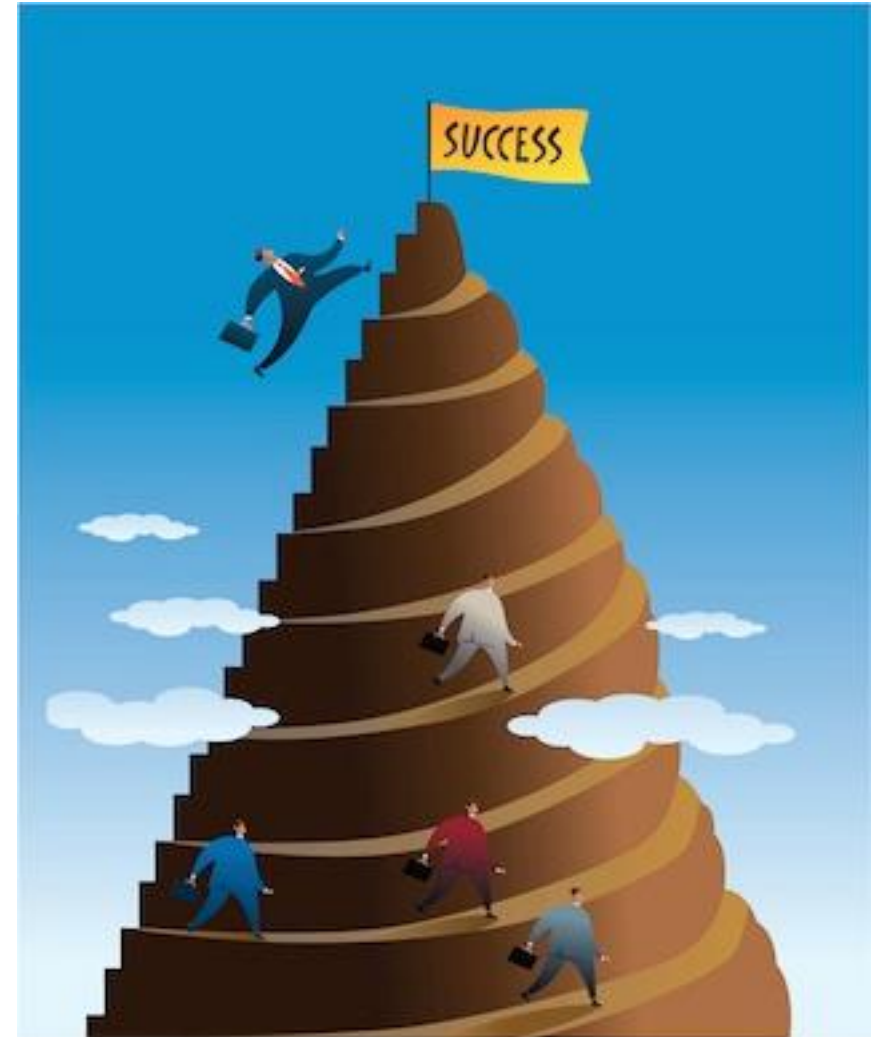
- Personalized
- Scalable
- Structured & milestone based
- Comprehensive with blended learning & activities
- Inclusive of recall & reinforcement
- **ALIGNED TO REAL WORLD SELLING**





# ABOVE ALL SALES ONBOARDING AT CROWDSTRIKE

- Caters to sales reps' natural competitive tendencies
- Aids bi-directional feedback for improved coaching
- Provides real-time progress to managers



# IMPACT AT CROWDSTRIKE

1. 70% Sales reps achieve/exceed quota
2. Sales reps rate the overall program at 4.8/5
3. 99% of Sales reps recommend the program

*Of all my years of various on boarding / new hire trainings I will say that this was the best experience and easiest to grasp.*

*- New sales rep*

*You've got it down to a science, and I just wanted you to know how valuable it was in helping to get me ramped up.*

*- New sales rep*

# Attributes of a Best-in-class Sales Onboarding Program: The MindTickle Sales Onboarding Framework

# ATTRIBUTES OF A BEST-IN-CLASS SALES ONBOARDING PROGRAM



# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING<sub>T</sub>

STRUCTURED

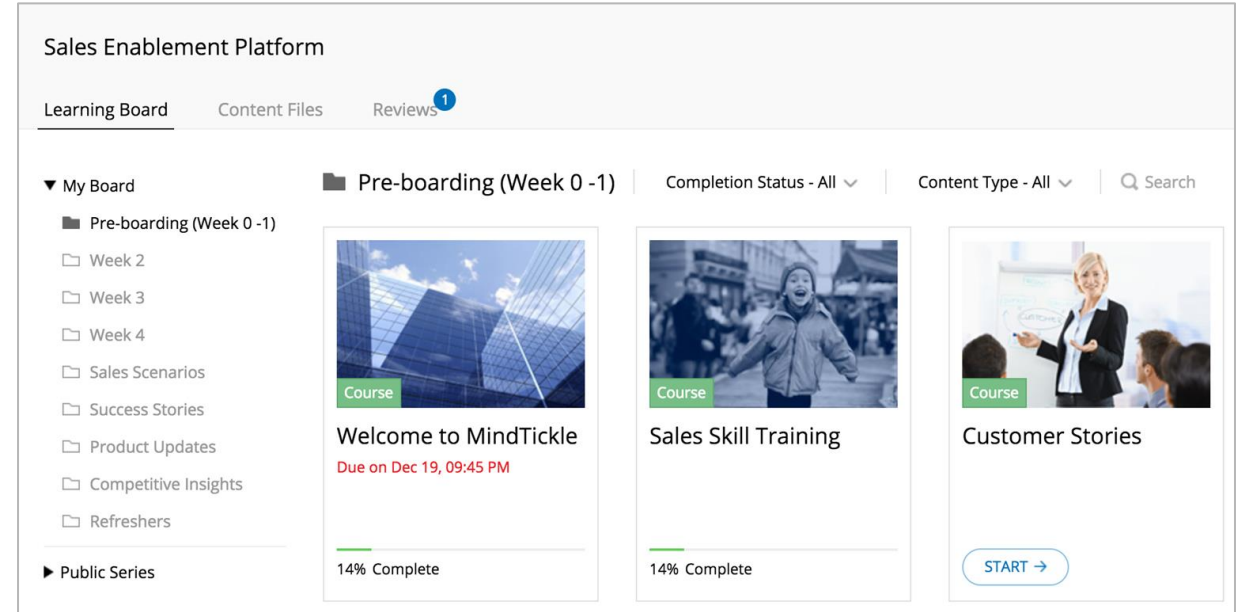
EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Milestone 1: New Hire consumes pre-boarding (non-proprietary) content as soon as they sign the offer letter and terms.



# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

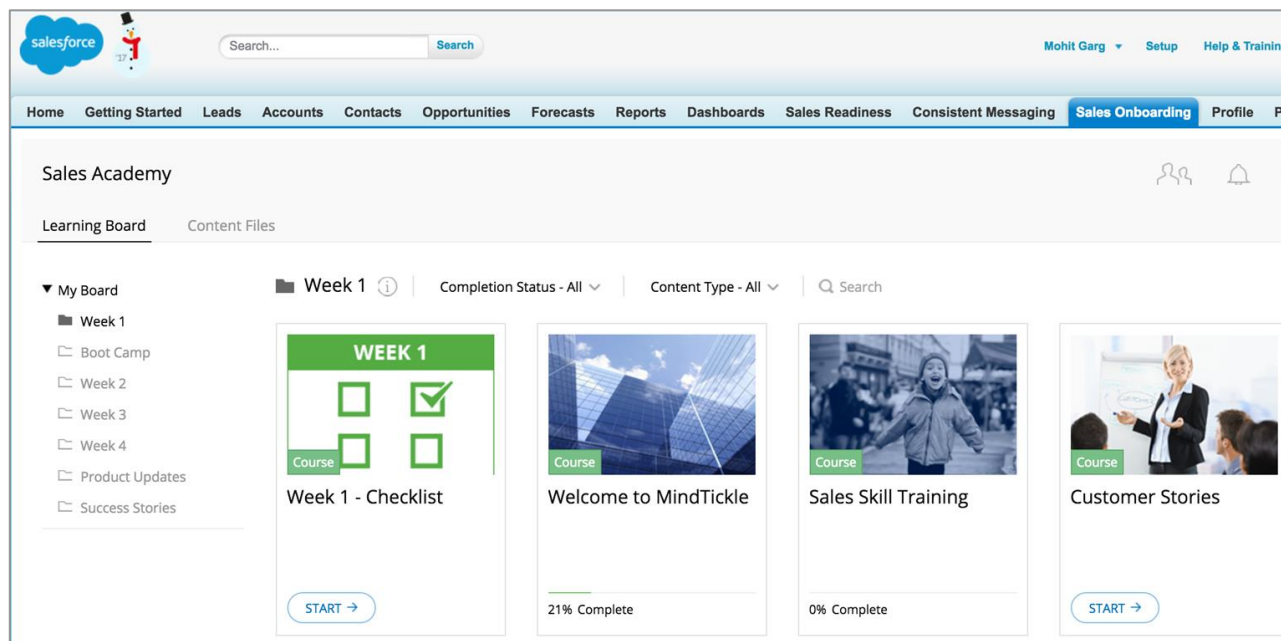
STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL



Milestone 2: New hire starts new hire orientation and pre-bootcamp activities.



# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

The screenshot shows the Salesforce Sales Academy interface. At the top, there's a search bar and navigation tabs including Home, Getting Started, Leads, Accounts, Contacts, Opportunities, Forecasts, Reports, Dashboards, Sales Readiness, Consistent Messaging, Sales Onboarding (selected), Profile, Products, Files, Groups, and Chatter. Below the navigation, the 'Sales Academy' section is visible, with a 'Learning Board' tab selected. The main content area shows a 'Boot Camp' section with a 'Completion Status - All' dropdown and a 'Content Type - All' dropdown. There are five course cards: 'Product Overview - Pre-work' (30:00m), 'Agenda for Boot Camp', 'Key Highlights of Day 1', 'Assessments & Quiz' (0% Complete), and 'MindTickle Elevator Pitch'. Each card has a 'START' button.

Milestone 3: New hire is certified on Product, Success Story, and Elevator Pitch.



# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Score 4.1 (Based on 2 reviews)

Knowledge: 4 dots, 1 grey dot  
Clarity: 4 dots, 1 grey dot  
Confidence: 4 dots, 1 grey dot  
Enthusiasm: 4 dots, 1 grey dot

**Congratulations!**  
You met the cut-off score (3.5) and earned a certificate.

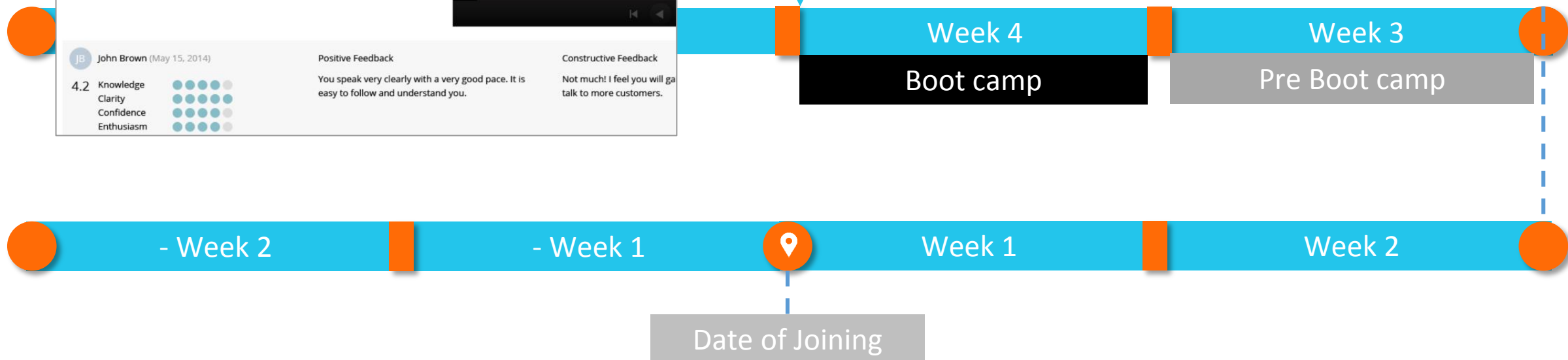
**John Brown (May 15, 2014)**

4.2 Knowledge  
Clarity  
Confidence  
Enthusiasm

**Positive Feedback**  
You speak very clearly with a very good pace. It is easy to follow and understand you.

**Constructive Feedback**  
Not much! I feel you will gain more customers if you talk to more customers.

Milestone 4: New hire is knowledge and message certified, and meets first major sales readiness milestone. Ex.: First discovery call





# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

STRUCTURED

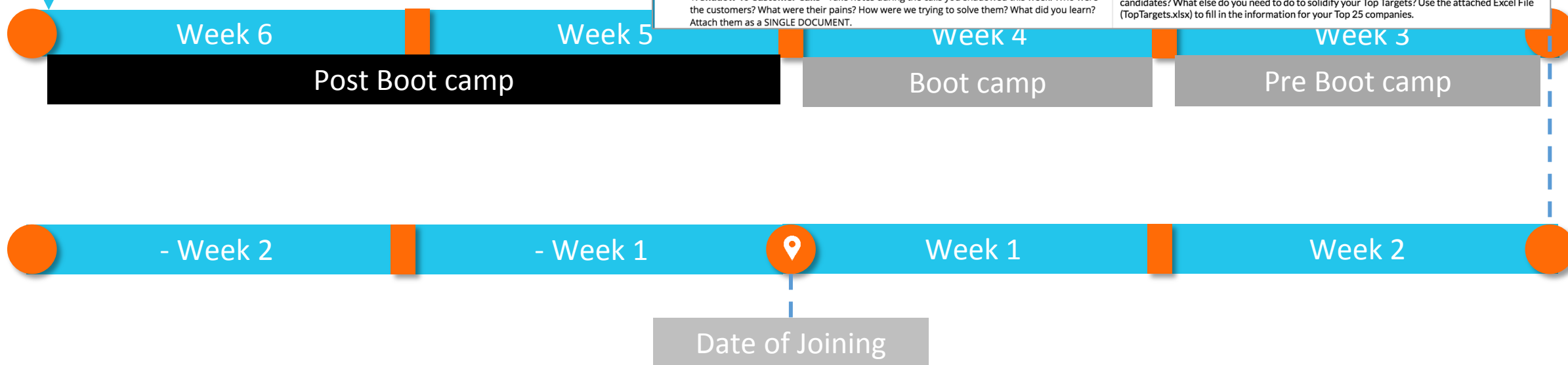
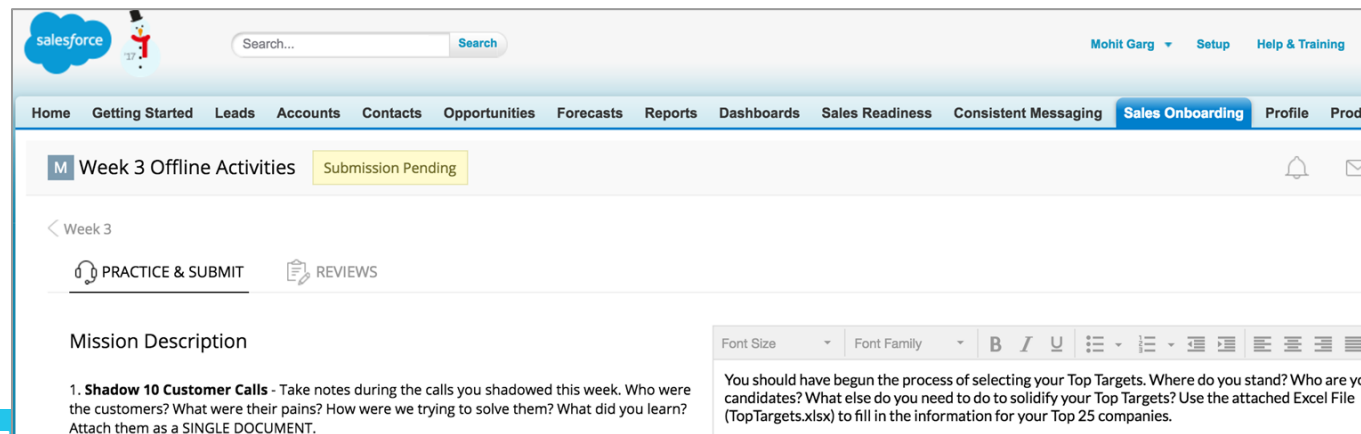
EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Milestone 5: New hire completes shadowing exercises and a check ride with a panel of SMEs, manager and / or seasoned reps



# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued

**STRUCTURED**

**EXPERIENTIAL**

**INVOLVE MANAGERS**

**ANALYTICS**

**IDEAL VS REAL**

60-90 Days

Milestone 6: New hire meets second major milestone.  
Ex.: First sale

Week 6

Week 5

Week 4

Week 3

Post Boot camp

Boot camp

Pre Boot camp

- Week 2

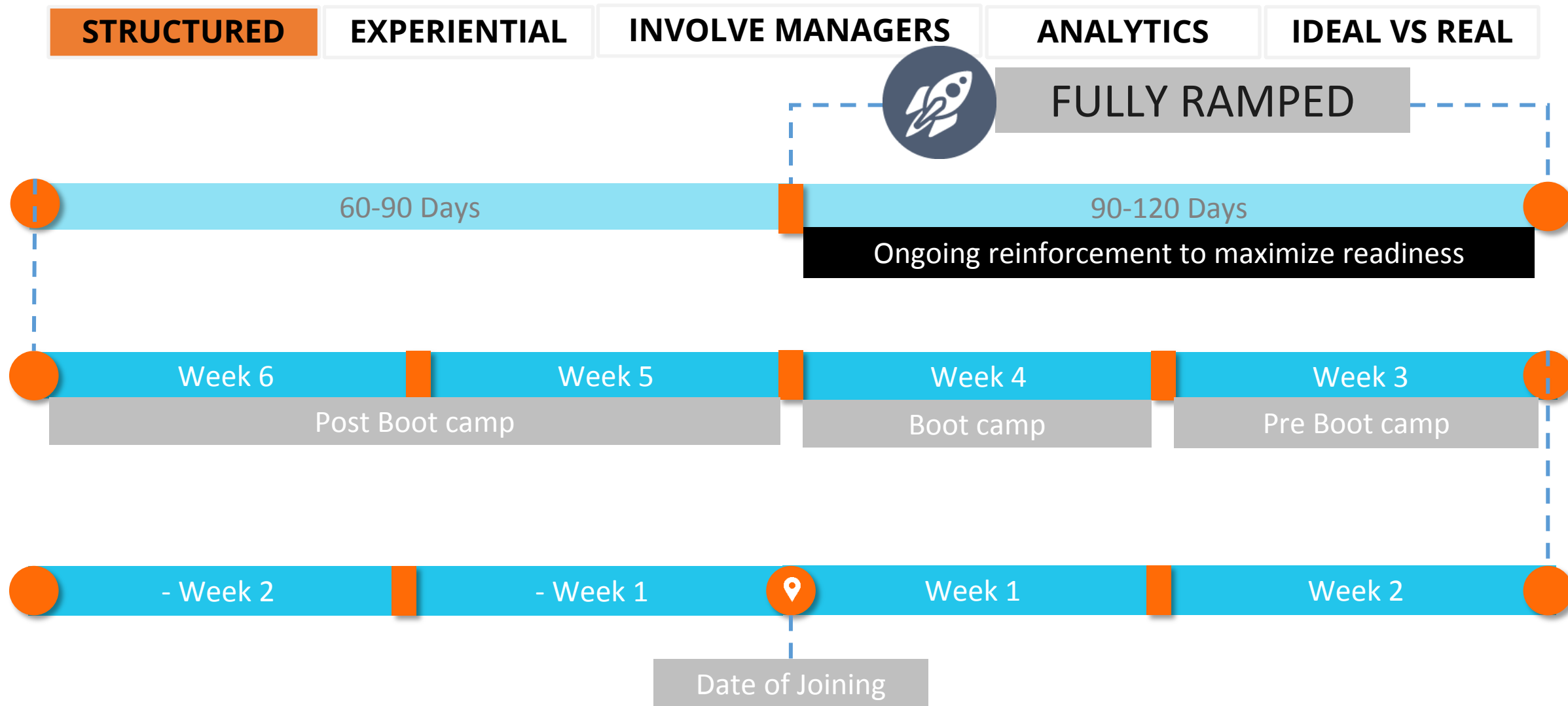
- Week 1

Week 1

Week 2

Date of Joining

# 1. STRUCTURED & MILESTONE DRIVEN SALES ONBOARDING - Continued



## 2. INCORPORATES A BLEND OF LEARNING AND REAL-LIFE ACTIVITIES

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

Champion badge screen: Reward higher badges as learners accomplish point thresholds

Check knowledge retention with our Points System

The screenshot displays a 'Product Training' interface. At the top, it shows 'Product Training' and a progress bar for '5345 / 5000 pts'. Below this, a visual journey is shown with five steps: 1. Readiness Platform (checked), 2. Features and Benefits (highlighted with a yellow box and a downward arrow), 3. Competitive Positioning (locked), 4. Pricing (locked), and 5. Use-cases (locked). To the right, a badge system is shown with three levels: Beginner (@1500pts), Advanced (@3000pts), and Champion (@5000pts). The Champion badge is highlighted with a yellow box. Further right, a 'Hall of Fame' table lists top performers:

Rank	Name	Points	Badge
1	John Smith	5345	Champion
2	Liz Wood	4560	Advanced
3	Mark...	3300	Advanced
4	Thomas Clark	2850	Beginner
5	Jason Johnson	2805	Beginner

Below the Hall of Fame, there are activity updates: 'Jason Smith completed Benefits. Now...', 'Thomas Clark earned 1 min ago...', and 'Jason Smith completed Platform. 3 mins ago...'.

Visual journey for a quick course overview

Foster healthy competition with activity updates from other group members

## 2. INCORPORATES A BLEND OF LEARNING AND REAL-LIFE ACTIVITIES

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

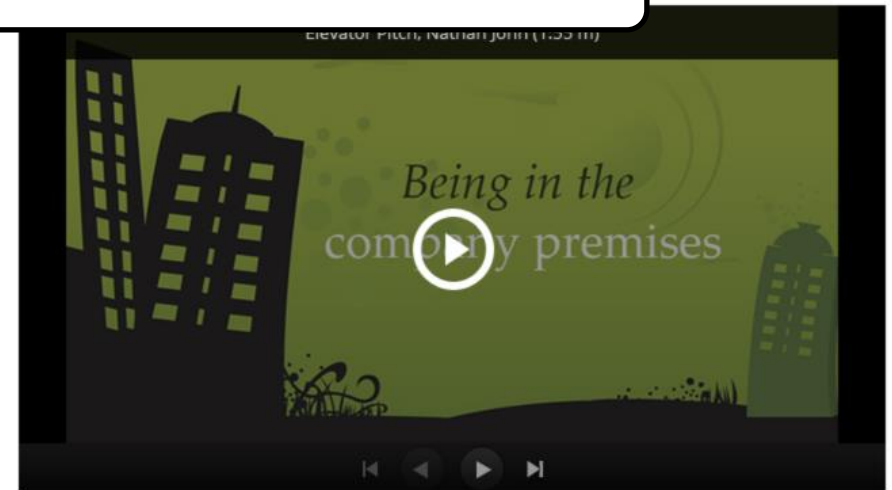
ANALYTICS

IDEAL VS REAL

- Get managers to review reps' pitches as a part of onboarding
- Facilitate peer to peer learning opportunities
- Enable and promote shadowing

Knowledge ●●●●●●●●●●  
Clarity ●●●●●●●●●●  
Confidence ●●●●●●●●●●  
Enthusiasm ●●●●●●●●●●

Congratulations!  
You met the cut-off score (3.5) and earned a certificate.



JB John Brown (May 15, 2014)

4.2 Knowledge ●●●●●●●●●●  
Clarity ●●●●●●●●●●  
Confidence ●●●●●●●●●●  
Enthusiasm ●●●●●●●●●●

Positive Feedback

You speak very clearly with a very good pace. It is easy to follow and understand you.

Constructive Feedback

Not much! I feel you will gain confidence once you talk to more customers.

# 3. INCORPORATES MANAGER-DRIVEN COACHING

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

- Get managers for Role-play and check-rides
- Send weekly progress reports
- Get managers to review certify pitches as a part of onboarding

Hi Gregor Keller,  
Here is the summary of your team's performance in Acme Sales Academy.

Sales reps	Participation	Completion
8	94% (Target:80%)	78% (Target:80%)

Sales Reps	Content Shared	Completed	Points Earned
David Judge	108	86	25836 / 47100
Karsten Flott	101	91	29661 / 44800
Bart van Knijff	105	82	31950 / 48800

Name	Day#	Completed/Assigned	Status	Avg. Score
Week 1	D-1	5/5	Completed	100%
	D-2	4/4	Completed	100%
	D-3	2/4	In Progress	55%
	D-4	0/5	Not Started	0%
	D-5	0/4	Not Started	0%
Week 2	D-1	4/6	In Progress	72%
	D-2	2/5	In Progress	55%
	D-3	0/4	Not Started	0%

■ Performance above 60%

Your Review

Customer Success Stories	●●●●●	5
Admits to what he/she does not know	●●●●●	5
Documents to-dos during the Check Ride	●●●●●	5
Engages with the audience when speaking	●●●●●	5
Delivers correct information	●●●●●	--
Answers questions asked, not evasive	●●●●●	5
Seeks clarification of ambiguous question or statement	●●●●●	--
Maintains command of the room	●●●●●	5
Properly associates business/account questions to SA for resolution	●●●●●	--
Understands when to say 'AWS may not be a good fit for ...'	●●●●●	5
Starts meeting on time	●●●●●	--
Appropriately defers questions to future slides, when appropriate	●●●●●	--
Ends meeting on time	●●●●●	5

Review Score 3.07

# 4. TRACKS NEW HIRE PROGRESS AND ENGAGEMENT

STRUCTURED

EXPERIENTIAL

INVOLVE MANAGERS

**ANALYTICS**

IDEAL VS REAL

- Data driven progress tracking of new hire progression
- Reporting with multiple views – Training, Enablement, and Sales Leadership
- Reporting by region, role, etc.



# 5. MEASURE AGAINST IDEAL REP PROFILE AND BUSINESS METRICS

STRUCTURED

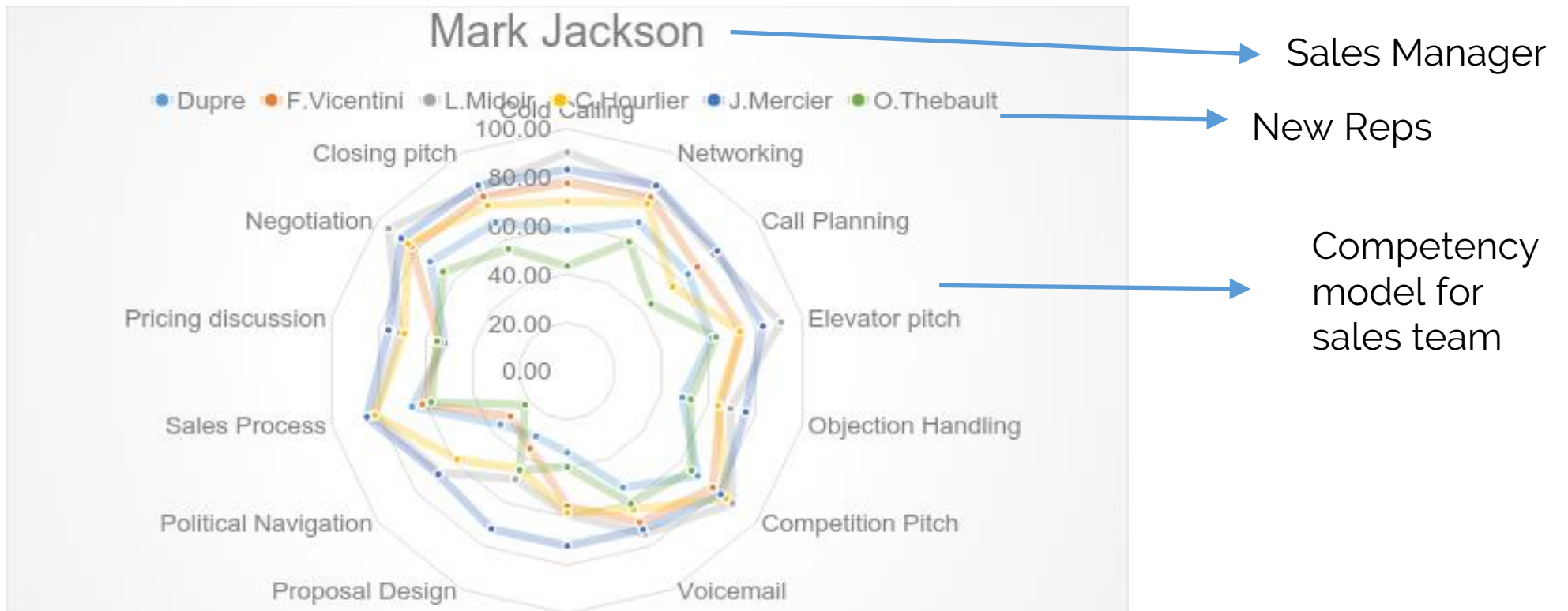
EXPERIENTIAL

INVOLVE MANAGERS

ANALYTICS

IDEAL VS REAL

- Measure rep readiness against the ideal profile/cometency model
- Correlate with KPIs e.g. pipeline at 180 days, #PresidentClub < 12/18/24 months, revenue from <24 months, 1 year attrition rate





## KEY TAKEAWAYS

1. A well-structured milestone based approach that is personalized for the sales rep's needs achieves best results
2. Investing into the right technology for delivery, tracking and administration makes onboarding scale
3. Blend knowledge with experiential learning activities
4. Follow up with recall and reinforcement activities
5. Map onboarding outcomes to business results - leading indicators (e.g. pipeline) and lagging indicators (e.g. revenue, quota attainment)

Questions?

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**Follow us on Twitter at [@mindtickle](https://twitter.com/mindtickle) for more tips and best practices**

Schedule a call  
with us for a deeper dive  
into Sales Onboarding.