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The Agile Sales Onboarding Methodology:
An Introduction

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Agenda

- Overview of "Agile" development process

- Identify challenges in Sales Onboarding

- Draw parallels between Agile software development and sales onboarding

- Understand how to apply the Agile framework to sales onboarding

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Being Agile – What does it really mean?

- Agile – "able to move quickly and easily"

- Product World - Agile is about delivering continuous value to the customer

- Sales World - Sales enablement exists to reduce time to productivity efficiently
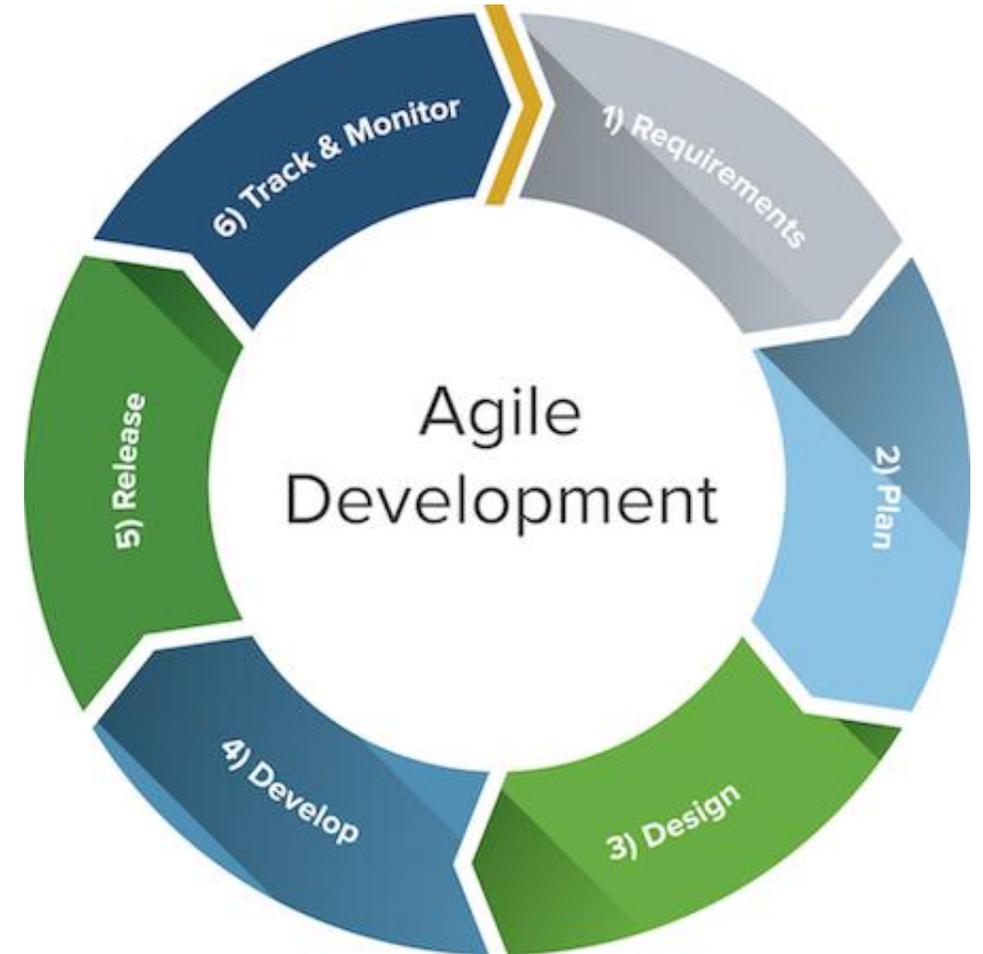
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Evolution of Agile

- A brief history lesson

- On-Premise: took months/years to develop and released when it was full featured & ready

- SaaS: Constantly innovating, shorter timeframe

- Connection to Sales
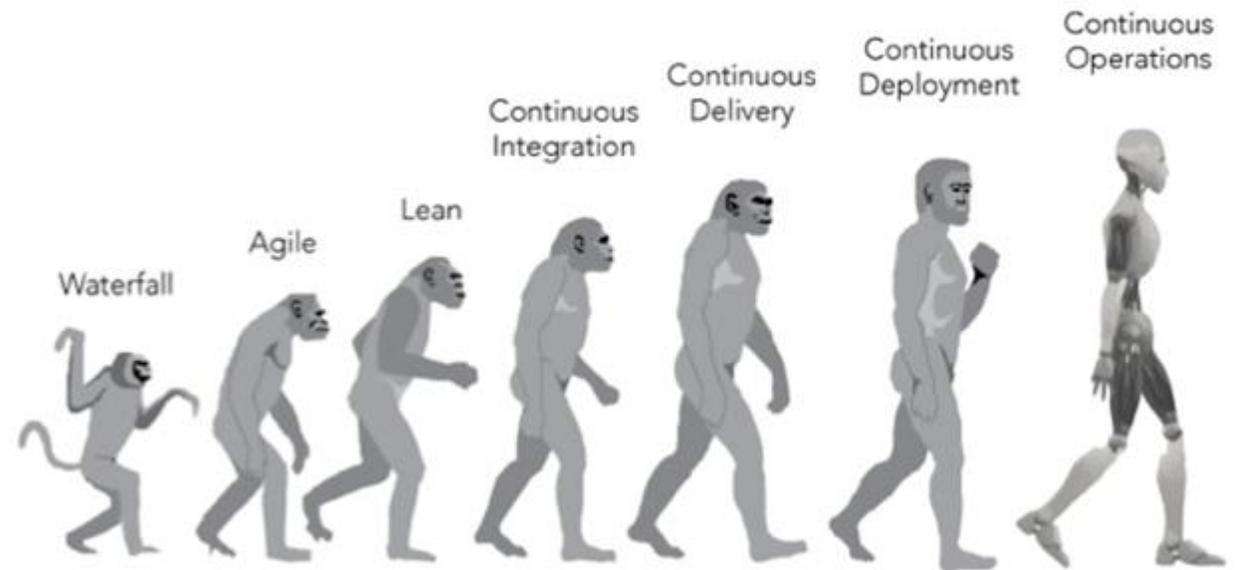
What is Agile?

- Agile is a time boxed, iterative approach to software delivery that builds software incrementally from the start of the project, while getting user feedback at every step along the way.

- So how does it work?
  - You make a list! (Planning)
  - Start executing (Sprints)
  - Make adjustments as needed (Sprint Reviews)
  - If I had to do it all over again… (Retros)

Agile Development

6) Track & Monitor
1) Requirements
2) Plan
3) Design
4) Develop
5) Release

Connections to Sales

- Planning- setting up a program

- Sprints- doing the activity-focused training/assessments

- Review- Implementation of program, check with sales leaders on status of students/program effectiveness

- Retrospective- After program is done, what did we learn from this program/certification? Where did the program prove value?

Planning

- Identify competencies

- Working with sales leaders to understand expectations

- Build foundational competencies 30/60/90 (time management, etc.)

- Improving productivity- need to improve reps ability to accomplish activities

Review

- Checking in with Managers on workable outcome of sprint

- Are sales reps hitting their KPIs at the right time?

- What did we learn during the sprint- both about the training itself and the rep's individual competencies

- Coaching is critical- embedded coach

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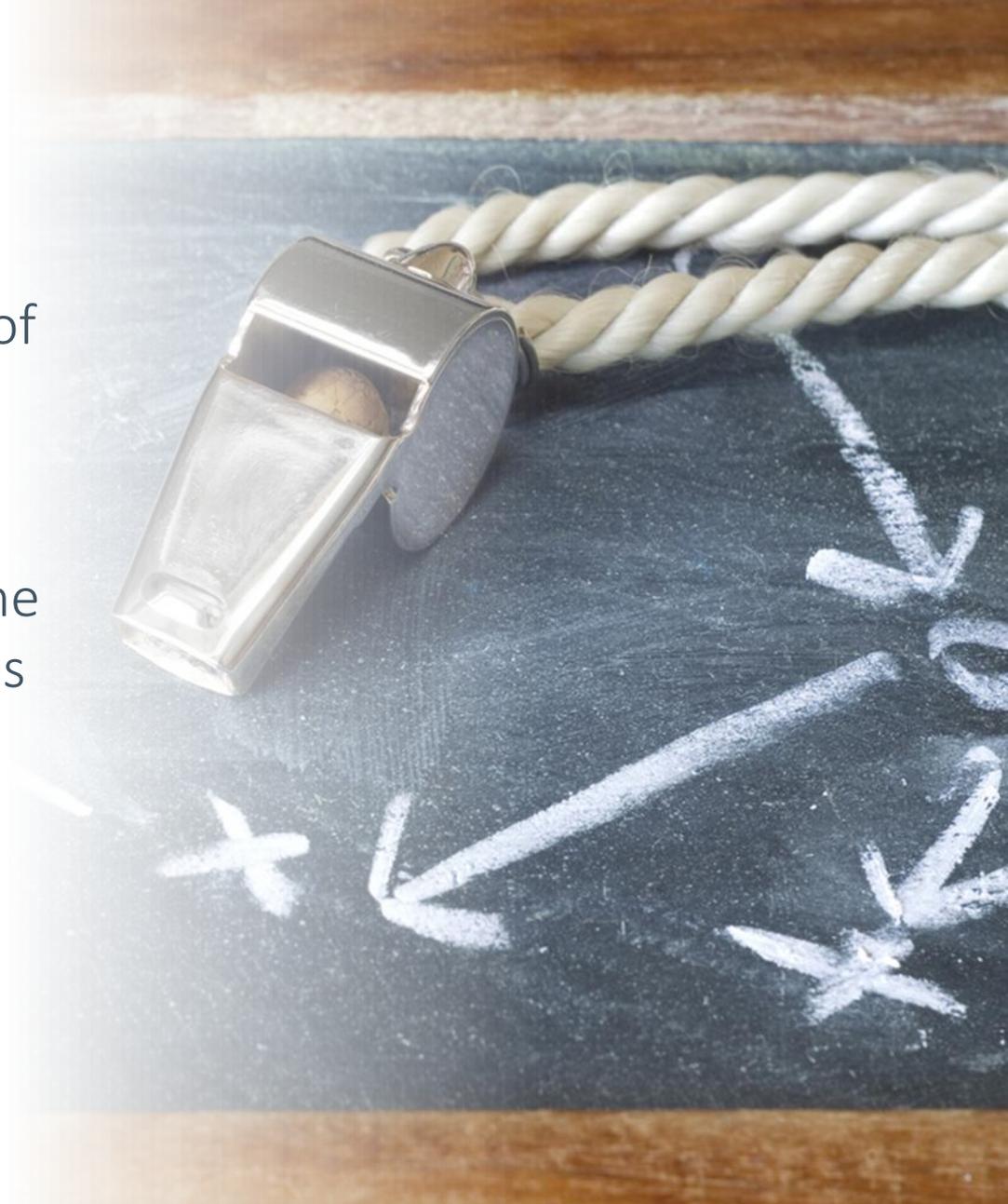
Retrospective

- What worked well that we should repeat

- What didn't work well that we need to fix

- What are you measuring?

- Activity level, modules completed, coaching challenges completed

- Not so much about checking boxes- more about what can we do better in spirit of continuous value

- Not standard process- needs to be agile

How Technology Helps

- Tracking individual readiness across team

- Track activity levels, use activity to track yield through pipeline

- Value/productivity parallel
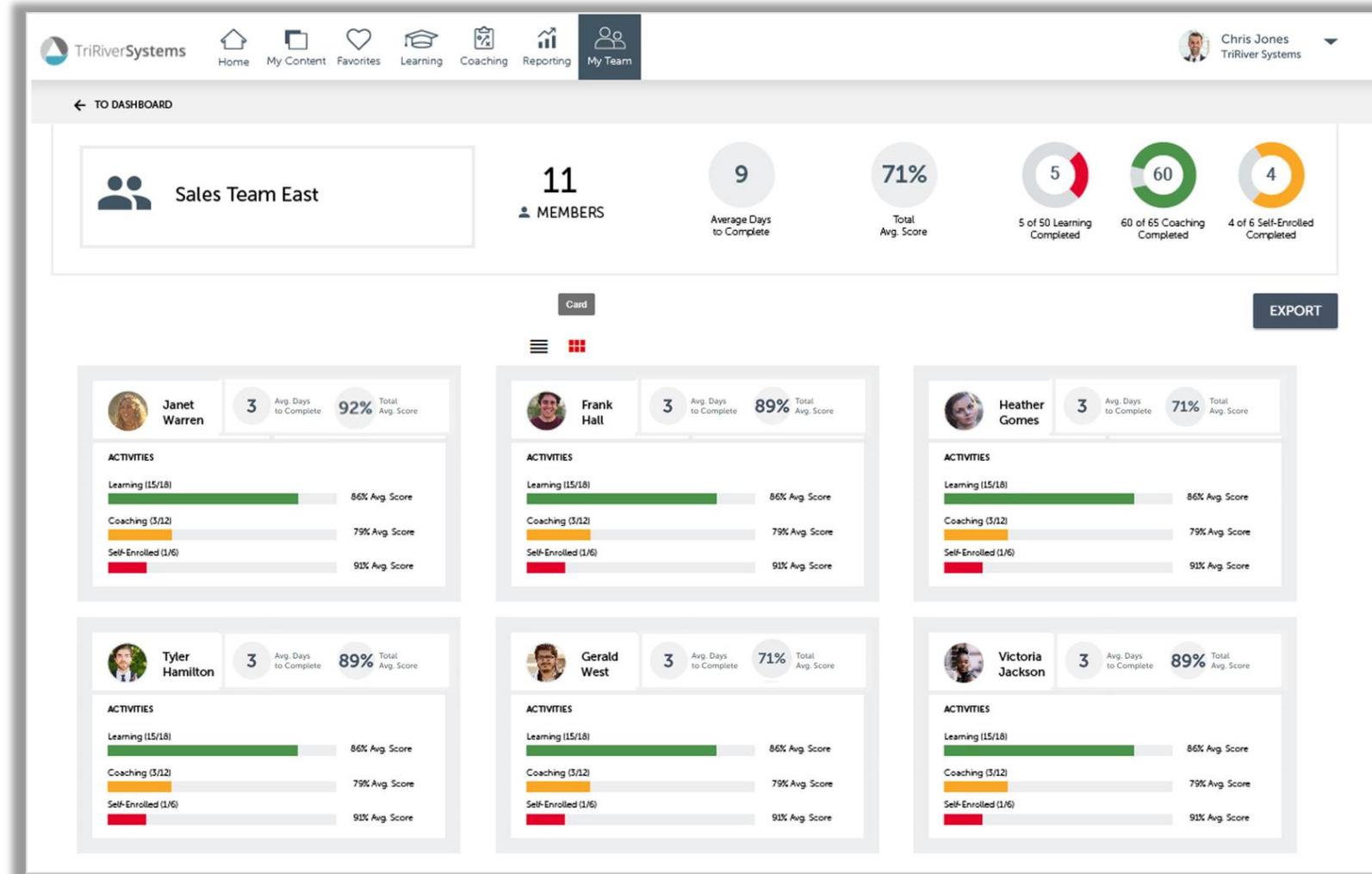
Similarities and Differences

- Similarity- You're never done in either situation
  - Onboarding never ends
  - Software development never ends
  - This sets you up for a perpetual readiness approach

- Learn from development-
  - Stepping back in a time machine to use what we know now to avoid previous mistakes
  - Agile: Never build same product twice- you learn for the future
  - Onboarding: You build the same product constantly- learn and improve

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Key Takeaways

- Focus on the competencies required for critical activities that lead to productivity

- In the "sprint phase" make goals attainable and assessment-centric

- Use the review process to assess and alter your onboarding efforts on the fly

- Leverage technology

- You're never done in either situation

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Questions or comments?

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