Reinvent Sales Onboarding with Mobile-Video Learning
Introduction

Few things under management control impact sales success more than fast and effective onboarding. However, traditional sales onboarding strategy continues to fall short, with only 7% of organizations describing their sales onboarding programs as robust and complete. Modern organizations now leverage mobile-video sales learning platforms to remedy this by dramatically shortening reps’ time to competency and reducing employee churn.

This whitepaper describes six specific ways you can use mobile-video sales learning tools to onboard sales reps more quickly, effectively and at lower cost.

1. Capture, create, and share engaging video content to build out the foundation for a successful onboarding experience.
2. Design learning paths to structure and sequence video content appropriately for different onboarding journeys based on competency areas.
3. Create a pre-boarding program to engage new hires in the onboarding experience using rich video content the moment they accept your offer.
4. Capture the in-class experience to evaluate baseline competencies and tailor follow-up reinforcement.
5. Instigate diligent practice and implement follow-up to bolster learning and curtail post-event “brain drain.”
6. Assess mastery from anywhere to evaluate and certify sales reps without the challenges of travel, scheduling logistics or connectivity.

The Challenge

Recent sales training studies show that it can take five to six months to properly onboard a new sales rep and 10 months before they’re at full competency. Shortening this ramp impacts revenue and profitability dramatically. Research shows that newly hired sales reps only contribute 25 to 50 percent as much as experienced reps², and recruits who require additional time to reach full competency incur incremental costs of $60,000 per month³.

Traditional onboarding programs often fall short because they cost too much, they feature generic and out-of-date content, and don’t accommodate the way the human mind actually learns. We know that new information entering the brain immediately begins to disappear if it isn’t used⁴; yet traditional onboarding usually consists of (1) flying reps in, (2) cramming for two weeks using the same, mass-produced content for everyone, and then (3) sending everyone back out into the field without any mechanism in place to reinforce what they’ve learned. Organizations thus scramble...
to provide remedial help as a last-gasp effort six months later when a rep is struggling to meet early quota metrics.

SiriusDecisions outlined some of the biggest shortcomings of traditional onboarding programs:

• Inability to efficiently assess individual reps at the beginning – Most organizations (73 percent) are not performing this critical activity, thereby precluding themselves from being able to take a data-driven approach to structuring learning for their teams.

• Lack of a comprehensive certification program upon completion – Only 40 percent offer any type of certification for reps at the end of the onboarding process; and of the organizations that do, few actually use the outcomes to determine when a rep is ready to engage buyers.

• Poor retention of new hires due to a lack of consistent reinforcement learning (ongoing coaching, mentoring, and follow-up exercises) – Organizations that execute on this see an average of 34 percent more first-year reps achieving quota, according to Aberdeen Research. However, only a small percentage of companies say that their managers are able to effectively do this because of the intensive nature of providing reinforcement learning on an individual rep basis.

The mobile revolution gives everyone the power to watch, record and share video anytime, on the devices we carry in our pockets every day. It’s time to harness the power of mobile-video to reinvent sales onboarding for the digital age.

Steps to a Successful Program

Allego works with sales organizations of various sizes in a variety of industries. We’ve distilled six critical steps sales leaders in any organization should take to roll out a mobile-video enabled onboarding program.

1. Capture, Create and Share Engaging Content

Build out the foundation for a successful onboarding experience with valuable content. Rapidly capture product knowledge, best practices, customer stories, top questions for objection handling and sales presentations from top performers across the organization.

The most successful sales organizations bring value to their reps the moment they join the team by creating a best practice library as a jumping off point for starting the onboarding process. Best-in-class organizations draw upon the collective experience of their teams by formally collecting, refining, and curating the priceless “tribal knowledge” that has traditionally been difficult to maximize.

For instance, a veteran team member coming out of a sales call where he had to navigate a tricky pitch with lots of questions around compliance issues can walk
right out to his car and record a two-minute video on his smartphone outlining how he answered them. He can share the video with his manager for approval, and if she chooses to, she can immediately share the video with the whole team, tag it, and make it easily discoverable for any team member looking for a refresher before they go into a similar sales call.

Or the manager can create a contest asking each team member to record a two-minute synopsis when coming out of a sales call. She can go through and pick the winner who has the most of that “special something” and share the video with the whole team for inspiration. The result is that sales organizations develop a best practice library filled with the most effective procedures and “win stories” for all the most common challenges specific to the individual company – essentially a self-updating YouTube-style sales playbook filled with distilled and highly relevant content coming straight from the field.

The company can later unleash new hires on this easy-to-access collection of success stories for crucial early onboarding learning. Furthermore, the already-established sales reps benefit from this valuable resource when they need a quick refresher on anything from handling a tricky objection to articulating new and complex product functionality. Seeing other reps discussing their success and being able to peruse videos of what worked with customers can be just the push that many reps need to walk into unfamiliar territory with confidence.

2. Design Learning Paths

Structure and sequence video content appropriately to create different onboarding journeys based on competency areas. Leverage videos, quizzes, role plays and flash drills.

Onboarding success requires creating a compelling and personalized onboarding journey. Leading organizations design learning paths with the understanding that they play a critical role in quickly getting sales reps to full competency as well as in creating perceptions about the organization and its culture.

Organizations need to employ software solutions that allow them to create learning paths using a modular format, according to eLearning Industry, to enable development of curricula for individual personas through a blend of modules collected from a pre-existing best practice library. This way, an organization uses assessments to establish baseline competencies and place reps into buckets based on predetermined criteria. Reps who have less experience with a particular aspect of the required learning go onto a learning path designed to focus more heavily on it. Other reps who already have competencies in the area in question go onto a separate learning path, which bypasses it.

Organizations thus direct their energy toward the areas where a rep needs improvement, rather than wasting bandwidth on information they don’t need. Furthermore, putting new employees on a personalized learning path fosters engagement and makes new hires feel respected and involved in the success of the company, according to NACE.
Lastly, organizations need to provide a variety of module types in each learning path to reap the benefits of collaborative learning by including interactive videos, mobile-video role plays, automated flash drills, and intelligent quizzes.

3. Pre-boarding

*Engage employees in the onboarding experience the moment they accept your offer by giving them access to learning content right away.*

Another great way to foster employee engagement and reduce the learning curve is to expose newly hired reps to great learning content right away. A rep recently shared a powerful example with us about her experience using our platform during her onboarding at a leading cloud based e-commerce platform provider. The rep described how she had accepted the offer from the company about a week prior to the kickoff day for new employees.

She enthusiastically relayed how it made her feel much more “at home” by the time she came to the in-person kickoff event, having had prior access to video modules created by reps (and curated by management) featuring demonstrations from the top performers on how to properly articulate company messaging and powerful customer stories. The rep felt connected to the company in a way that would not have been possible with traditional text-based learning content – well before beginning her in-person training. Management assigned her a video submission as a primer to prepare for a presentation on the first day of live training and she was able to garner valuable feedback from the program director before having to make her actual presentation to her peers.

Pre-boarding also improves knowledge retention as well as reps’ ability to apply their knowledge to their job. Art Kohn⁸, cognitive neuroscience professor and corporate training consultant, describes this technique as “priming.” Priming capitalizes on a phenomenon of memory wherein exposure to one stimulus has a high degree of influence on the response to a second one; which according to Kohn is the reason why a learner is more likely to remember information they have already been exposed to. A classic example is if you were to ask a friend to repeat the word “silk” 10 times in a row and then immediately ask them, “What does a cow drink?” More likely than not they will say “milk” because having primed them with the word “silk,” the question about cows brings to the forefront the semantic relationship in the mind between cows and “milk” in place of the more obvious answer: water.

Using mobile-video to leverage tried and true learning concepts pays large dividends when it comes to shortening time-to-competency for your new sales reps. Be sure to design any comprehensive onboarding program with a pre-boarding phase to ensure maximal performance.

4. Capturing the In-Class Experience

Record relevant class sessions, role plays, and video workshops to evaluate baseline competencies and tailor follow-up reinforcement after the event. Managers can review their new sales reps’ role play performance and provide custom coaching – remotely.

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Teams must capture the relevant moments of a live training session in order for sales organizations to truly reap the benefits of personalized learning that modern technology offers. Personalized learning techniques have seen a substantial increase in adoption due in part to rapid advances in technology, as well as the added ability to monitor individual students on a large scale and subsequently assign learning tasks based on competencies, according to a 2015 RAND Corporation Study. The study outlines three basic elements needed to administer effective personalized learning, as it relates to corporate learning: (1) creating flexible learning environments, (2) determining learner profiles, and (3) personalizing learning paths.

Organizations must create a flexible learning environment to monitor learners and get a baseline for adapting learning content to individuals or sub-groups based on assessments of existing knowledge, skills, and gaps. Mobile-video platforms provide a fresh opportunity to do this by giving sales organizations the capability to record high quality videos of live training experiences that can later be applied to the other two elements of personalized learning (determining profiles and personalizing learning paths). Sales leaders and trainers can identify the parts of the live sessions, workshops, or role plays that will likely be key determinants of the right learning paths for reps, and then go ahead and use the platform to capture them for later analysis.

Additionally, management should capture and leverage the valuable information that inevitably arises unexpectedly during live training so a mobile-first solution is critical to capturing and sharing video on the fly. Take, for example, a situation where a trainer notices that a new hire keeps confusing two closely related concepts about a certain product’s functionality and thus decides to do an impromptu role play. This valuable data point can be captured and shared with the rep’s manager in order to provide ongoing coaching to that rep.

5. Instigating Practice and Implementing Follow-up

On average, 84 percent of sales training content fades from the mind within 90 days of a training event. After the class, distribute video assignments for reps to watch, accompanied by associated role play exercises. Provide ongoing coaching and feedback as well as a means for capturing and sharing powerful field experiences via video. Bolster reps’ knowledge retention with quizzes and flash drills.

Managers can use the video content from live sessions to analyze strengths and weaknesses of individual reps and then send them on the appropriate learning paths with supplementary custom coaching. With reps now in different competency buckets, managers can give video assignments asking them to record their version of the presentation for a particular product, service, or tricky regulatory issue where they needed improvement. The reps then practice this particular aspect of the pitch until they have mastered it enough to upload a video of themselves delivering it seamlessly. This exercise of video rehearsal instigates reps to diligently practice in private where they might not have had the discipline otherwise. The prospect of having to submit a video for evaluation tends to make them over prepare, typically motivating them to practice the presentation five to six times more than they normally would have.

Video rehearsal also bring to light subtle personal idiosyncrasies, which can sometimes derail an otherwise strong presentation. A pharmaceutical sales leader relayed a story...
about a new rep who would unconsciously roll his eyes upward as he delivered his presentation. He was not aware that he was even doing this until he was tasked with submitting a role play video for evaluation by his new manager. In reviewing his numerous takes, he began to notice his own behavior and was able to correct it.

Next, managers review the submitted videos and provide in-line feedback throughout to pinpoint areas within each pitch that were either great or need improvement. This can be done on their mobile device, whenever and wherever they are located — without the need for an internet connection. This freedom enables sales managers, once struggling to keep up with coaching 10 reps, to effectively coach and train 15 reps, in some cases.

Managers should also continue to facilitate collaborative learning by assigning periodic “pro tip” videos to all reps, which gets them to record a video relating an interesting customer story, objection handling technique, or presentation. The managers should then take time to isolate videos of reps who have just the right personal presence when presenting a certain product, or ones where reps demonstrated exceptional fluency articulating company messaging. These can be leveraged to showcase best-practice presentations to the rest of the team. Newly hired reps can use these “top-gun” videos as a guide when they are practicing for submission videos as part of their own ongoing remote video coaching and role play with managers.

Finally, use “gamified” flash drill software to send clickable push notifications or email alerts so reps can do a quick drill session wherever they are. This takes advantage of a reinforcement learning technique known as spaced repetition learning, which has been studied and utilized for many years in a variety of contexts. Studying new information in repeated intervals over an extended period of time — instead of all at once — lets the brain know this information is important and must be retained.

6. Assessing Mastery Anywhere

Evaluate and certify sales reps without the challenges of travel, scheduling logistics or connectivity. Managers can provide in-video feedback and administer a standardized assessment with a customizable criteria scorecard after viewing submissions.

Use asynchronous video to perform sales certifications at the end of the onboarding process to be certain that new hires are ready to engage with buyers. This frees up managers to offer feedback where they might not have otherwise been able to due to travel or time constraints associated with face-to-face sessions. State of the art video compression software enables all of this to be done anytime, and from any location, with or without an internet connection.

One particular case of a leading financial services company best illustrates this. The company faced the challenge of onboarding a large group of new reps that were located around the globe, making it simply too slow and costly to fly them all back to do in-person certifications after they had made it through their respective learning paths.

Instead, management assigned certification videos to be distributed to individual reps. Managers tasked individual reps with using the platform to record presentations they had struggled with during the live training, as well as ones they determined were especially critical for reps to nail before getting in front of prospects. Managers reviewed
the videos, and used the in-line feedback functionality to grade each rep's performance on multiple criteria, ranging from command of the material to presentation style and alignment with corporate strategy.

Each sales rep used the feedback to record and submit an improved performance of the different presentations. When a manager decided the rep had mastered them all, they marked him or her certified, and the organization completed the certification process at a fraction of the cost.

Conclusion

The traditional onboarding process falls short because organizations created it for the disconnected world of yesterday. Mobile-video sales tools empower managers to respond by providing an easy way to modernize this vital process. Organizations realize major improvements in the quality and success of onboarding, while at the same time making it easier, cheaper and more engaging for sales reps.

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About Allego

Allego provides an intuitive sales learning platform that boosts sales performance by harnessing the power of mobile devices to transform enablement and training through video content sharing. With Allego's mobile-first platform, organizations can create and curate the best content from the field and corporate office to better train and collaborate with sales teams, without the time and expense typically associated with in-field coaching or on-site training. Users can easily access relevant, quality content, anytime, anywhere, allowing them to capture their best ideas, master their pitch and accelerate their performance. Tens of thousands of global users across a range of industries have adopted Allego to improve sales success. Explore further at www.allego.com.