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# **Use a Fail-Fast Sales Onboarding Model to Quickly Confirm Seller Readiness**

By Shayne Jackson

## Use a Fail-Fast Sales Onboarding Model to Quickly Confirm Seller Readiness

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**FOUNDATIONAL** This research is reviewed periodically for accuracy.

By Analyst(s): Shayne Jackson

Initiatives: Sales Enablement

Efficient onboarding ensures consistent sales performance as companies grow. Failing to onboard sellers successfully puts sales goals at risk. Successful sales enablement leaders assess new hires' skills and knowledge with increasing rigor in the onboarding process to prepare sellers to succeed.

### Overview

#### Key Challenges

- Despite best efforts by HR and sales leadership, organizations inevitably hire sellers who fail to meet expectations once they are in their territory. This is a common problem that puts revenue and future opportunities at risk, disrupts customer relationships and threatens the morale of the team.
- Not wanting to prematurely terminate an underperforming new seller, managers and sales leaders invest significant resources trying to “fix” a bad hire. The longer this takes, the more strain there is on the sales organization — the frontline manager spends a disproportionate amount of time helping the new hire get up to speed at the expense of the rest of the team.
- Many organizations fail to verify new sellers' knowledge and skills as they advance through new-hire programs. Sellers end up “graduating” from the program unprepared to use their new skills and knowledge with customers.

#### Recommendations

Sales enablement leaders who want to ensure the success of new sellers should build a sales onboarding program that includes a fail-fast methodology that:

- Tracks the progress of sales new hires as they step through the onboarding knowledge checklist to ensure they arrive at sales boot camp with a solid foundation of knowledge.
- Provides sellers with assessments that reinforce the training taught during the sales boot camp event to allow them to apply their new skills and knowledge and check for understanding.
- Assesses and reinforces knowledge and skills learned in boot camp with scenario-based exercises where sellers demonstrate their mastery of a specific skill.
- Evaluates sellers' customer-readiness by assessing a range of skills and knowledge through a simulated sales call with a panel of sales leaders who score the new seller using a standardized rubric.
- Increases the rigor of the assessments as sellers progress through the onboarding process, offering increasingly realistic demonstrations of their skills and knowledge.

## Introduction

Sales roles have a high turnover rate, as much as 18% annually, second only to customer service/call centers, according to our research. <sup>1</sup> This means organizations turn over their sales force about every five years. A widely cited study by DePaul University states that replacing a sales rep costs nearly \$100,000. These recruiting and training costs do not include the cost of lost opportunities when the territory is vacant and a new seller comes up to speed.

Frontline managers struggle to find the right balance to support new sellers. Many managers are not content to wait the average 26 weeks for a new hire to get up to speed. <sup>2</sup> They often attempt to accelerate this ramp to productivity by spending an excessive amount of time coaching the new hire. But what about the rest of the manager's team? With less support from their manager, each team members' development is hindered as a result of less coaching, and in some cases, reduces deal support. At what point does the manager make the tough decision to terminate a new seller who isn't delivering the expected results? Is it better to have an underperforming seller or an uncovered sales territory? Depending on the organization's culture and duration of its sales cycle, this decision point ranges from six months to 18 months. Underperforming new hires, in addition to being a cost burden, put a strain on the organization.

A strong onboarding program provides new sellers with the skills and knowledge needed to be successful. This foundational knowledge is often complemented with on-the-job training, joining their peers in customer meetings and receiving coaching from their managers. New hires founder without a comprehensive onboarding program – deemed too inexperienced to meet with customers, they're unable to build the competence and confidence needed to make a strong start without guidance. To ensure sellers have mastered the content delivered in the onboarding program, enablement leaders should assess and verify their skills and knowledge with increasing rigor as they progress. The few sellers who are assessed as not customer-ready, after they complete the onboarding process, should be placed into more suitable positions or terminated.

## Analysis

### Track the Progress of the Onboarding Knowledge Checklist

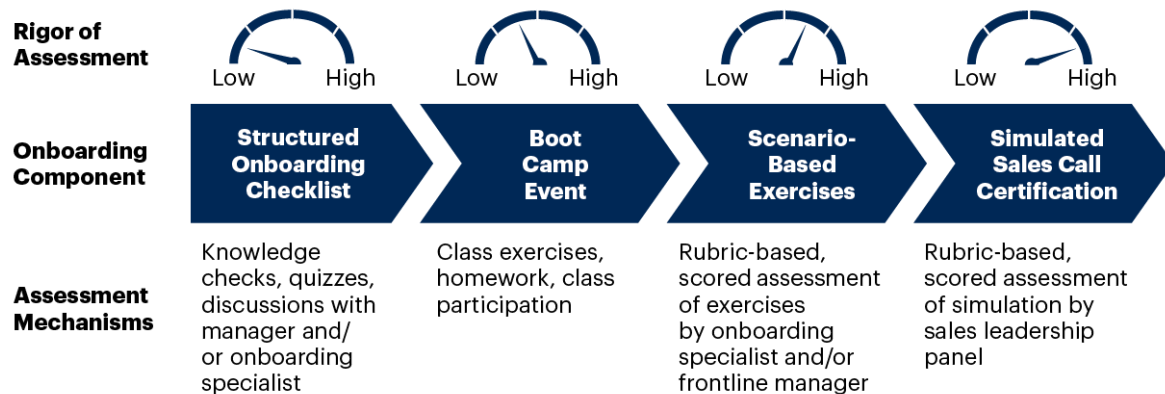
There are four steps to the onboarding process of new sales reps:

1. Pre-boot-camp: Onboarding knowledge checklist.
2. Sales boot camp: Learning and application of knowledge and skills.
3. Post-boot-camp learning: Scenario-based exercises.
4. Sales certification: Sales simulation.

Each step in the fail-fast onboarding process has different assessment mechanisms built-in to evaluate the progress of the sellers (see Figure 1). The rigor of the assessment increases with each step in the process. At the end of the seller's onboarding, the sales manager and sales leaders have a set of evaluations and scores that are a good indication of sellers' customer-readiness and likelihood of success based on the results of their assessments along the way.

**Figure 1: Onboarding Steps and Assessment Mechanisms**

## Onboarding Steps and Assessment Mechanisms



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The onboarding knowledge checklist guides new sellers through their first several weeks and prepares them for a productive sales boot camp by ensuring they have the required fundamental knowledge and skills to maximize their learning opportunity. An onboarding knowledge checklist is made up of some, if not all, of the following learning activities:

- Completing online training
- Meeting with peers and experts
- Reviewing large amounts of information in readings and videos
- Practicing certain sales activities
- Observing customer and prospect interactions with peers and leaders

Many of these activities will align to a seller's milestones, as mentioned in "Leverage New-Hire Incentives to Pay for Performance During New-Hire Onboarding." As new hires come up to speed in their first few weeks, the onboarding knowledge checklist should be their primary focus. The rigor involved in reviewing their progress with the checklist is minimal. Without much practical experience, the goal for the new hires is to absorb the new information so they have context as they progress through the onboarding process. The online training should have quizzes at the end that provide sellers with guidance when the incorrect answer is selected. In addition, quizzes can be created to check sellers' knowledge of the readings and videos they reviewed. All the information provided during onboarding should be reinforced with quizzes and exercises to reduce lost knowledge and increase learning application.

Managers, mentors and/or onboarding specialists should meet with new hires at least once a week to validate their progress on the checklist. These meetings should focus on reinforcing the information new hires receive and on new-hire comprehension. These conversations and reviews should be very low-pressure. There is value in making mistakes. Allow sellers to learn, and clarify what they have learned, throughout their onboarding experiences.

Questions in these review meetings should be focused, aligned to the meetings the new seller is attending and the customer interactions they have observed. Instead of asking generic questions about how the meeting with a suggested sales rep went, ask pointed questions about the specific topics covered, with new hires explaining what they learned from the interaction. Some examples of more targeted questions include:

- What were some of the challenges the customer faced that helped him identify the best differentiators to promote?
- What positioning changes did she make when she learned that the customer was also considering that particular competitive solution?

The value for the seller, in these meetings, lies in repeating the newly learned information and getting clarification. The value for the manager and/or onboarding specialist is an early view at how the new hire is processing the information and putting different components of knowledge together into relevant conversations. Most importantly, these conversations confirm for the manager or onboarding specialist that the new seller is building the foundation required to be productive in the next step of the onboarding process, sales boot camp.

## Assess Exercises That Reinforce Lessons Taught in Sales Boot Camp

Many sales organizations have their new hires attend a sales boot camp event. These events range from a few days to a few weeks, depending on the complexity of the sales environment, the experience of the sellers and the resources available. Sellers who completed the onboarding knowledge checklist are ready to take the next step in their new-hire training: an intensive learning experience surrounded by their peers. Effective sales boot camps deliver a large amount of information new sellers need to be effective in their first quarter and focuses on the topics most relevant to the sales stages they will be covering with their accounts.

The assessments and evaluations made during sales boot camp should focus on helping the sellers learn, applying just a little more rigor than the reviews during the onboarding knowledge checklist. Sellers should be encouraged to stretch themselves, taking risks as they apply what they have learned. In addition, the sellers should be made aware that their time at sales boot camp is dedicated to learning and their focus should be on expanding their knowledge; account responsibilities should be deferred to nonclass hours.

There are several ways to help the students apply what they've learned in sales boot camp to balance out lecture-style sessions. Interactive classes help maintain attention and provide a view into which sellers are participating. Class exercises, either in small groups or with the whole class, provide an opportunity for sellers to apply what is being taught as well as learn from each other. Paying attention to the dynamic in the small group exercises provides insight into which sellers are engaged and who may need some additional support.

With so much to cover in sales boot camp, instructors may choose to reinforce some topics with homework (i.e., exercises done after the conclusion of the day's class or before the first session the following morning). Homework should reinforce or apply something that's been taught and could take up to an hour to complete. Completed homework should be submitted and feedback provided, either individually or as part of a classroom exercise. Feedback should focus on helping the sellers learn from their mistakes and the mistakes of their peers. The people running the boot camp should informally make note of any sellers who didn't put the expected effort into the homework and assess whether it was due to a lack of understanding or a lack of effort. This could play a role down the road, shedding insight into future assessments.

See Table 1 for examples of exercises that can be used to reinforce information shared at sales boot camp.

**Table 1: Knowledge Application Exercises to Informally Assess Sales New Hires**

Observed Behavior to Informally Assess	Examples of Exercises to Apply Knowledge
Classroom Participation	<ul style="list-style-type: none"> <li>■ Small-group discussion</li> <li>■ Asking questions</li> <li>■ Sharing experiences</li> </ul>
Small Group	<ul style="list-style-type: none"> <li>■ Research and discuss a seller persona</li> <li>■ Create a talk track for a customer scenario</li> <li>■ Practice negotiation tactics for specific scenarios</li> <li>■ Teach back a small part of one of the day's lessons</li> </ul>
Homework	<ul style="list-style-type: none"> <li>■ Practice delivering a demo</li> <li>■ Review a pitch and deliver part of it in-class</li> <li>■ Find resources in an online scavenger hunt</li> </ul>

Source: Gartner

### Use Scenario-Based Exercises to Assess Skills Learned at Sales Boot Camp

After sales boot camp, sellers return to their territory-focused sales activities. However, the onboarding process continues with scenario-based exercises – activities that help sellers apply what they have learned to accounts they are (or will soon be) working with. Leading organizations schedule these exercises over several weeks and use them to assess sellers' readiness with exercise-specific rubrics.



These exercises allow sellers to demonstrate their command of an important skill or competency in a safe environment. To further help sellers apply their knowledge and to help prepare them for future customer interactions, each exercise should be approached as if sellers are working with a specific customer or prospect. Scenario-based exercises are assessed with more rigor than the previous onboarding steps and use a well-defined rubric to measure each assignment's success.

Sellers should be able to prepare for scenario-based exercises in an hour or two, applying the same level of diligence they would for a customer meeting. Each exercise should be adapted by sellers so it is relevant for their accounts. For example, an elevator pitch should be customized to a specific person being targeted in a deal. In addition, it's important to consider the time required to evaluate each assignment – the number of assignments that will need to be evaluated and the resources available to provide insightful, timely evaluations. For example, an organization with a new-hire class of 20 sellers should create an exercise that requires individuals to deliver two specific, key slides (fewer than five minutes in duration) in a standard customer presentation, instead of having each seller deliver an entire 45-minute presentation.

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*When designing these assignments, some organizations underestimate the time required to thoroughly review them in order to score them properly with the rubric. Some assignments may take two or three reviews to score all the skills and behaviors being assessed.*

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The rubric should have several measures for specific traits of the demonstrated behavior or knowledge to standardize the evaluation and allow comparison of results. To ensure fair and consistent evaluations, have these evaluations done by someone other than the seller's direct manager, either a sales enablement team member or another sales manager. Having multiple evaluations is best. Any information about the customer that the seller feels is necessary for the evaluator to understand can be disclosed as part of the preparation. It's important to remove all bias from scoring and provide each seller with an independent evaluation of his or her performance.

Once the evaluation is complete, the sales enablement team gathers the feedback, anonymizes it and delivers it to the seller, furnishing a copy to the seller's manager. A score below a certain level should require the seller to repeat the exercise. Feedback should be constructive and specific, praising the positives and correcting any errors.

Table 2 lists several types of scenario-based exercises that can be assessed with a rubric as part of an onboarding curriculum.

**Table 2: Scenario-Based Exercises That Can Be Evaluated During Sales Onboarding**

Scenario-Based Exercise	Output	Estimated Duration of Assignment Assessment
Draft a prospecting email	Email	5-7 minutes
Complete a win/loss report for a colleague's recent deal	Email	5-7 minutes
Configure and quote a solution	Email or system-generated quote	5-7 minutes
Host an introductory or qualification call with a "customer"	Call with manager or sales enablement personnel playing role of customer	30 minutes (duration of call)
Deliver part of a demo or customer pitch	Self-recorded video	10-15 minutes for 5 minute video
Negotiate part of a deal	Self-recorded video	10-15 minutes for 5 minute video
Overcome an objection	Self-recorded video	10-15 minutes for 5 minute video

Source: Gartner

## Evaluate Seller Readiness With a Simulated Sales Call

Once sellers complete their assigned scenario-based exercises, the next step in the onboarding process is a simulated sales call (see Figure 2). This is the last step in the fail-fast onboarding methodology and has the most rigorous certification process. In the simulated sales call, the sellers, with guidance from their managers, select an account most relevant to them in the coming weeks. The role of the customer is played by members from sales leadership and sales enablement. A rubric for this assessment should be comprehensive, detailing the behaviors, traits and knowledge expected from sellers at this stage of their onboarding. The assignment should guide sellers toward opportunities to demonstrate these same behaviors, traits and knowledge.

The sales enablement team should encourage sellers to prepare for this exercise as they would for an important customer meeting. Designed to last about 30 minutes, this simulation should take sellers through typical interactions they would have with a customer, including objections, pushing for clarification, challenging presented information and anything else that might happen in a meeting with a contentious customer.

The assessment should be designed to be fair but difficult. Only sellers who truly demonstrate they are adequately prepared to meet with customers should be able to pass. Part of the value of a fail-fast methodology is the building up of the self-confidence of the sellers who pass and are ready to meet with customers, and the confidence of the sales leaders who have now seen the new hires demonstrate the knowledge and skills required to succeed with customers. Another benefit is that the group assessment of sellers removes managers' burden of evaluating a poor performer by bringing in the perspective and judgment of the sales leaders and evaluating them on an objective rubric.

Figure 2: Simulated Sales Call

**Simulated Sales Call**

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After the seller completes the simulated sales call, the sales and sales enablement leaders independently score the seller based on the rubric or proficiency matrix (without the seller present). The scores are tallied and any anomalies or significant variations should be reconciled. The organization should have a minimum score required to pass the certification. When the seller returns, one of the panelists (ideally the seller's manager) shares the results, highlighting what was done well and where additional work is required. Those who pass move on with the final stages of onboarding. Passing this rigorous assessment is cause for recognition; new hires who successfully complete their certification should be recognized by sales leadership in an appropriate communication.

The sellers who are not successful with their certification should be given an opportunity to try again. Over the course of a week or two, the seller would prepare once more, applying the feedback they received and taking advantage of coaching from their managers or someone from the panel. Their second assessment, no more than two weeks after the first, should have the same rigor as their first. Sellers who are unable to successfully complete their certification the second time around and who struggled to complete the scenario-based exercises are not a good fit for the organization. The organization, having assessed certain sellers are unable to demonstrate they can successfully navigate a challenging customer meeting, should find another role for them or guide them to a swift exit. The few sellers who don't make the cut are often relieved to quickly know the organization is not the right fit for them. This gives them the opportunity to find their next, better-fitting job sooner and avoid months of struggling to succeed and failing to meet quota.

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*Looking back at the assessment history of the sellers who fail to pass the sales simulation, it is common to find a pattern of low scores or incomplete assignments – warning flags for sellers who are not customer-ready.*

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## Conclusion

With the fail-fast onboarding methodology, organizations assess sellers throughout the onboarding process to identify those most likely to fail and instill confidence in those who successfully complete the process. Instead of giving low-performing new sellers several quarters to prove themselves, investing time and resources to coach and support the seller and watching the territory's business suffer, the fail-fast methodology identifies these underperformers early. Building in assessments throughout the onboarding curriculum, with increasing levels of rigor, ensures new sellers have an opportunity to apply what they have learned in customer-centric exercises. This methodology builds new hires' confidence and assures the sales leadership team the sellers are on a path to success.

## Evidence

<sup>1</sup> "Employee Turnover Trends for 2019"

<sup>2</sup> "Sales Onboarding Benchmark Report"

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## Recommended by the Author

Some documents may not be available as part of your current Gartner subscription.

Ignition Guide to Building an Onboarding Plan for Sellers  
Reduce Sales New Hire Time to Productivity With a Structured Onboarding  
Knowledge Checklist  
Case Study: High-Performing Seller-Driven Onboarding (Expedient)  
Measure and Demonstrate the Impact of Sales Training

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