

How to Recruit, Hire, and Onboard Top Sales Performers



Executive Summary

One of the most complex and critical components of implementing and maintaining an efficient sales structure is the **selection, hiring, and integration of new salespeople**. There are many moving parts in this vital function or series of related functions, including:

- Defining the sales position to be filled
- Determining and working the right channels to find top candidates
- Selecting the best candidate and making the job offer
- Successfully onboarding the new hire

Each of these components has clear benefits when done well and a negative impact when done poorly.



A key area that is too often taken lightly or completely overlooked in the hiring process is onboarding. You can make all the right moves and hire a great salesperson, but if a proper onboarding plan is not in place and executed, you risk minimizing their impact or having them leave for a better opportunity. Every new employee should feel confident in their decision based on the onboarding plan. This individual left their previous employer to join your organization, so validate their decision to join your team by delivering strong onboarding.

Above all, it is important to remember that hiring is a process; a process that must be planned, managed, and executed with great care and diligence.



Hiring is a Process

A sales structure for any organization cannot truly be efficient or effective without **two essential elements: people and processes**. These two key components intersect most keenly during the hiring phase. Hiring is a process that needs to be given the attention and respect it deserves. After all, what other process in your organization can so critically make or break your success? It is incomprehensible that many companies take the hiring of new employees lightly; they do not give it the time and resources needed. Often there is confusion on why there is continued failure to successfully hire, onboard, and retain top sales talent.

The Dangers of Making a Bad Hiring Decision

Management, leadership, and success guru Peter Drucker has written that, “One-third [of hiring decisions] are outright failures. In no other area of management would we put up with such dismal performance.”



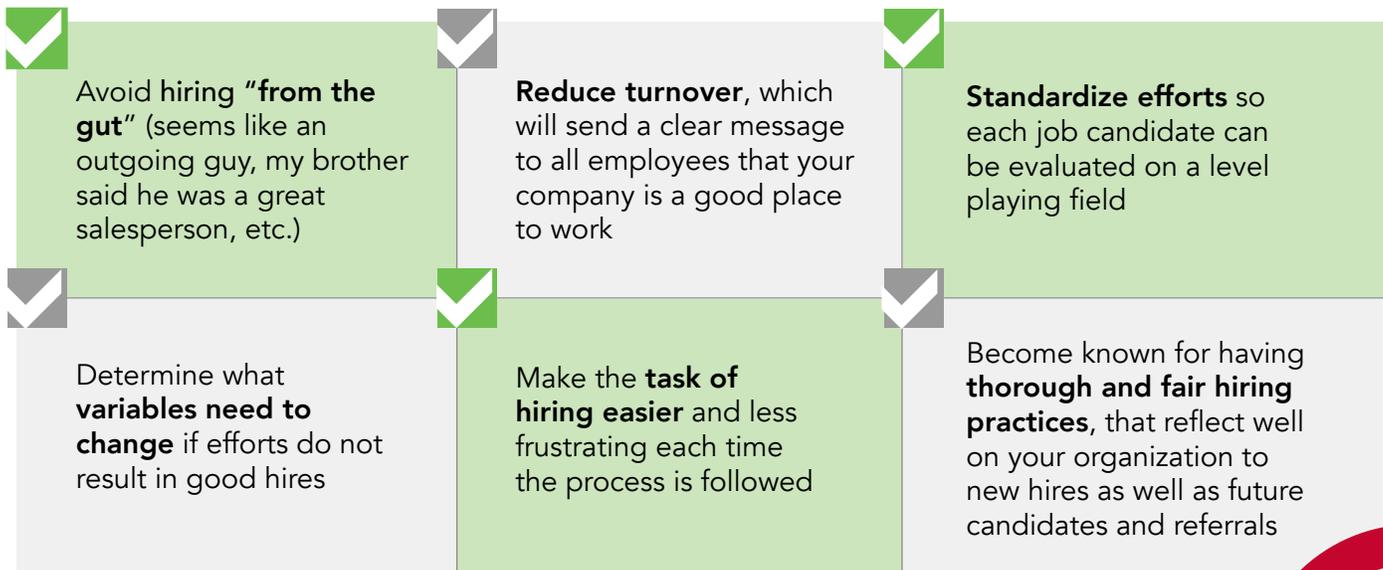
Poor hiring decisions result from many factors, but there are clear steps and techniques to use for successfully hiring a top performer. Additionally, there are risks in making a bad hire. Beware of these red flags:

- A corporate “revolving door” due to employee turnover
- Constant hiring and training – with unending related costs
- Employee overhead and related costs being incurred while the employee is being trained and before becoming productive
- Loss of sales pipeline while transitioning to a new salesperson
- Loss of customer confidence due to repeated turnover and exposure to one new salesperson after another
- Misdirected management time due to constant focus on hiring new salespeople to replace those who “didn’t work out”

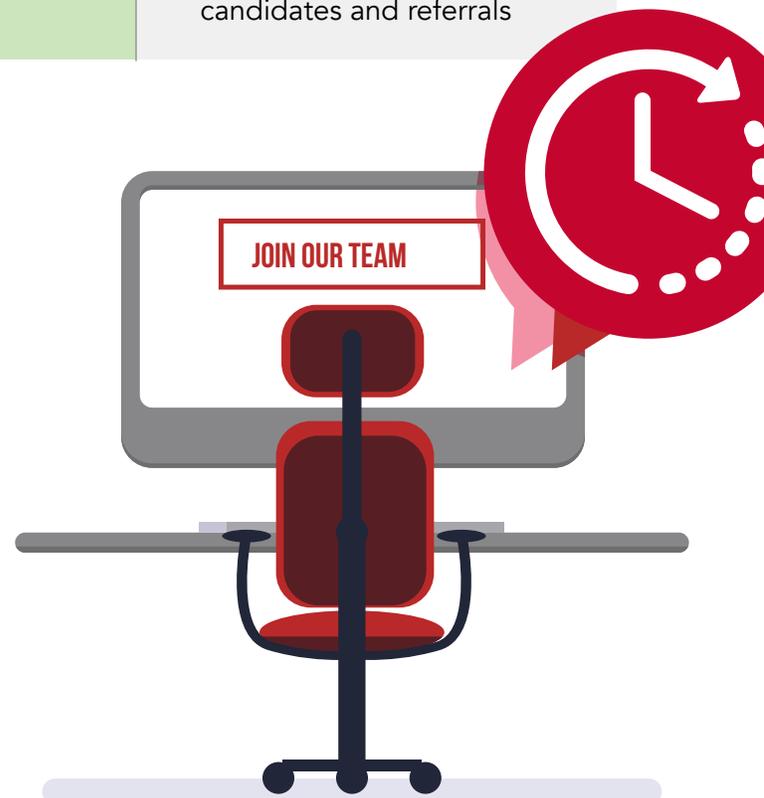


The Benefits of Using an Effective Hiring Process to Find Great Salespeople

Placing the proper attention and effort on designing and executing an effective hiring process empowers an organization to:



Considering all these benefits (and more), why do so many companies take shortcuts and hope for the best? It boils down to the fact that creating an effective and manageable process takes a lot of upfront effort. Even so, **the time and energy it takes to develop and manage a great hiring process is time you won't have to spend dealing with a succession of sales employees who don't live up to your expectations.** Each one of these "do overs" represent wasted time and take you back to square one. On the other hand, if your process is clear and yields results (to find, hire, and integrate a top salesperson) more than it falls short, you can spend your time managing your sales operation.





Where do you start?

The hiring process, if done well, takes some time to develop. It should be methodical, measurable, and manageable. It should be a start-to-finish series of steps to be undertaken with one goal in mind: bringing a superior salesperson – for mutually beneficial compensation – onto your sales team to increase sales and improve your bottom line.

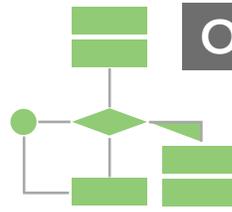
The following hiring process components are necessary to make that happen:



- ✓ Define the position
- ✓ Write a detailed job description
- ✓ Create an ideal candidate profile
- ✓ Use outreach and sourcing channels to find a pool of successful candidates
- ✓ Narrow the field
- ✓ Assess and interview top candidates
- ✓ Select the best candidate and make an offer
- ✓ Onboard the hired salesperson

You must identify who in your organization has the proper skill set for hiring sales talent and will ultimately be responsible for each component of the hiring process. If you do not have someone with the skill set or time to commit, hiring an outside resource or organization to find top sales talent can produce high quality sales candidates. In either approach, all parts of the process must be valued and managed.

But before you undertake any part of the process, you must also ensure you have a solid onboarding system in place.



Create a Solid Onboarding Process

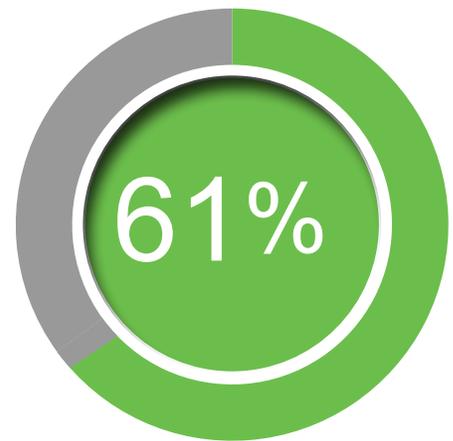
While everyone else in your organization could be considered overhead, a salesperson's performance is directly linked to revenue. That is why a carefully designed and implemented onboarding program is so critical to have in place before executing the hiring process. It can help protect your investment, ensure a high return, and keep a solid sales performer in your organization for years to come.

The Onboarding Process

Effectively onboarding a new salesperson is one of the most essential precursors of success for any sales organization. Some smaller businesses do little (if any) onboarding, while others treat onboarding as an event or a short-term orientation.

At its core, onboarding is the process through which a new employee, in this case a new salesperson, gets "up to speed" by gaining necessary information and insights and becoming proficient with the tools and methods necessary for success in the organization.

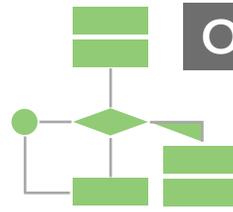
Onboarding is not – or at least should not be – a haphazard series of missteps and lessons learned "the hard way." In any successful organization there will emerge over time (and through the efforts of knowledgeable and talented leaders) traits and practices that have proved successful. Onboarding is taking these proven elements and systematically making them available to new employees. In this sense, onboarding is not just a process, but also a system.



61% OF CEOs AND SALES LEADERS GAVE THEIR ONBOARDING EFFORTS A POOR RATING.

PROPER ONBOARDING ENSURES SALESPEOPLE ARE EFFECTIVE RIGHT OUT OF THE GATE.*

* Data compiled from 1,647 Sales Xceleration Sales Agility Assessments.



The Benefits of Onboarding

A well-crafted onboarding process delivers essential benefits such as:

Clear expectations. In other words, everyone: the salesperson, the Sales Manager, company leaders, and customers, knows what is expected in terms of methodology and results. Onboarding can help eliminate misunderstandings, mistakes, and embarrassing missteps.

Greater confidence. The new salesperson who comes on board to a supportive sales team will quickly gain confidence that he or she made the right decision in joining the company. Bolstered by a wealth of shared knowledge and effective processes, that confidence will enhance chances for quicker sales success.

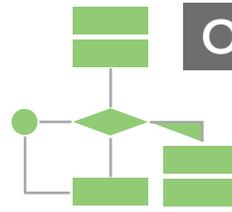
Optimized performance. Clearly defined and understood sales methods are good insurance to help sales personnel operate effectively and efficiently. By providing the proper tools, removing obstacles to success, and clearly showing the way to reach that destination, the new salesperson can be expected to perform and excel.

Less vulnerability. Because the company has shown it can move forward with another salesperson if the need arises, the organization is less at risk. Any talented salesperson would surely be missed, but if that salesperson moved on, the loss would be less disruptive or catastrophic for the company if a good onboarding plan is in place.

Time saved. The organization will be dedicating time upfront to orienting the new salesperson, but allocating that time to a structured onboarding process will save the company much more time down the road.

Money saved – and earned. Time is money; therefore, making it quicker and easier for the salesperson to build a pipeline and start producing not only saves money on non-productive time early in the salesperson's tenure, but also makes the return on your investment happen more quickly.





Onboarding Basics

Onboarding does not have to be difficult, but it should be systematic and developed before it is needed. Recognizing that any plan should be flexible based on the needs of the incoming salesperson, an effective onboarding plan should typically include:

- An agenda (sent in advance to the new hire) describing what the first day, week, and month will look like
- Clearly articulated expectations (written form is best) for the sales role
- Essential company information and background
- Essential target market, customer, and prospect information, including sales cycle and pipeline details
- Essential company sales messaging, as well as access to key company sales and marketing collateral
- Clearly understood compensation plan
- An explanation of company roles and the organizational hierarchy so that the new employee knows where to turn for answers and other support
- An explanation of company systems, resources, and tools, as well as what training is available

Implementing an onboarding plan should include upfront dedicated time and information followed by real-world applications of that knowledge, reinforcement, and adjustments as needed. Make sure that all persons who will be engaged in the onboarding process are aware of their roles and when they will participate. There is nothing worse than having someone not show up while a new employee is sitting in a room waiting for them.

Orientation

Every minute your salesperson is “on the bench” and not selling for the company, he or she is merely a cost on the books. This person brings high expectations and potential, but still lacks company and market information possessed by others in your organization. To help ensure sales success during the learning and orientation phase, make sure your team educates your new salesperson about:

- Your products and services
- Your Unique Selling Proposition
- Distinct characteristics of your market, including what your market values
- What your competitors offer and promote (and how your company stands apart)
- Available tools
- Internal resources to go to when prospects or clients have a question a new salesperson can’t immediately answer with confidence

Continued Support

Sales success requires not only focused onboarding as described above, but also continuing support for constant learning. Just as you should not bring new salespeople on board and immediately cast them adrift, neither should you assume that they will know everything after 90 days. Offer continuing support and mentoring will shorten the time for new hires to achieve success. **To learn what area that support is most needed, you should conduct 30, 60, and 90-day reviews after the hire.** This will help you correct issues quickly so you can put – and keep – your new salesperson on the path to success.



30 60 90 REVIEWS



Defining the Position

Before you can hire the right salesperson for your sales team (either by recruiting, promoting from within, or hiring from outside the company) you will need to have a clear definition of the available position. If you have an established sales team and the position is essentially the same as one previously defined, you may be set. However, if your job description has not been updated in years, it is probably a good idea to revisit how the position is defined. **On one end of the scale, you might need to do a thorough needs assessment or a “gap analysis” for your department or organization before hiring.** On the other end, your new position definition could be as simple as “tweaking” an existing description to account for differences between the new position and current sales positions – by market served, territory represented, or other key factors. Either way, make sure the other primary stakeholders in your organization are involved to bring to light any new factors or forthcoming changes that could affect how the position is defined. By reaching out internally, you might even learn of qualified candidates looking for a new opportunity within the organization.

One thing to avoid, especially when hiring to replace a top sales performer, is setting your position requirements solely based on traits specific to that sales superstar.

Consider if your current or future needs call for a different skill set to take you to even higher achievement – eventually. Also, avoid the trap of basing your position requirements on traits or qualifications your prior salesperson lacked. In other words, whether your departing salesperson was particularly good or bad, keep your new position definition separate from how that individual fit an outdated definition.

What to Define

What are some major components of the sales position to be defined? Here are just a few:

When filling a sales position, consider (and provide details for) current conditions and needs, such as:



Primary responsibilities



Present opportunities, challenges, and workload



Required core competencies and functional skills



Current organizational culture considerations, such as the management style of the person to whom the new salesperson would report



Necessary education, background, and experience



Sales approaches, methodologies, and roles (i.e., specialist or generalist, hunter or farmer)



Where the position fits in the organizational structure (particularly in terms of reporting relationships)



Determining Your Outreach Channels

With your onboarding system in place and your sales position clearly defined, it is time to start your candidate search, right? Well, not just yet. First, you will need to determine the right channels to reach the best pool of top sales candidates. In today's electronically connected, real-time culture, you have many more options than in days past when you simply wrote an advertisement and placed it in the local newspaper or on the chamber website. In fact, the method of posting job ads on Glassdoor, LinkedIn, and other popular job search sites is seldom a successful route to hiring a skilled salesperson due to the time it takes to filter through the large volume of unscreened, often unemployed candidates. Quantity of applicants does not equate to quality. Online job ads might still work if you are hiring someone locally for an entry-level support position, but proven sales talent must typically be found using more modern and strategic methods. Today, top-level sales talent is ideally found through other means, such as a database of contacts built over time, participating in industry conferences, tradeshow, recruiters/talent managers, targeted advertising to top sales performers, and networking.

A Multifaceted and Systematic Approach

Any way you approach it, successful recruiting today is normally a multifaceted and systematic venture. For example, **you might use a combination of web-based, video, phone, and face-to-face methods at certain phases in the recruiting process.** Because candidates today use many different information channels, you should consider using those that are particularly prevalent in your industry. Are there industry forums that are widely used by upper echelon sales performers? Online trade magazines? Websites with rich articles and blog posts that knowledgeable salespersons frequent and leave comments on? If so, you can scour these sources to find potential talent to build your candidate database overtime. With a potential candidate's name in

hand, you can almost always use Google, LinkedIn, Facebook, or other social media sites to learn more and reach out to interesting candidates who are currently succeeding in their sales roles. Beyond this, you might also need to consider and utilize a specialized sales recruiting firm. Paid talent managers can plumb new depths in searching for sales talent. They typically have more sophisticated tools and an expanded network of proven channels through which they can locate candidates you might not be able to find. Using a company that specializes in finding sales talent based on unique needs can shorten your search in many cases, while increasing the caliber of the candidates. When seeking new sales talent, it is natural to constrain your search to those candidates within your industry, but **do not overlook the benefits of searching beyond your industry for salespeople with transferable skills.** Some of these benefits include:

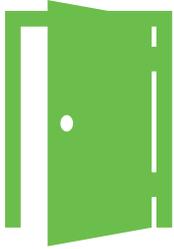
- ✓ **Avoiding** candidates with bad habits and industry burn-out
- ✓ **Attracting** candidates who can "fish in any pond" versus counting on an industry insider to bring you current clients (this expectation seldom pans out)
- ✓ **Finding** fresh talent in related (and relatable) fields whose top performers mirror the traits needed for success in your industry
- ✓ **Landing** flexible, adaptable, and results-focused sales performers who consistently exceed sales quotas because they have transferrable sales fundamentals and a disciplined work ethic

Two final channels for sourcing possible sales position candidates: your internal corporate network and your external personal network. Do not be shy about letting your co-workers, customers, friends, family, and professional associates know that you have a position to fill. Your connections run only so deep; you can expand those connections exponentially by letting people know you need help.

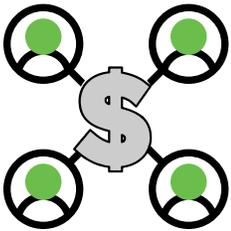


Ideas for Creative Recruiting

Not having much luck using traditional recruiting channels or methods? **Get creative!**



- **Single out prime candidates and invite them to a “Learn More” open house event.** There are two big benefits from this approach: 1) those that show up are clearly interested, and 2) you will get to interact with applicants and see how they relate with each other in a group setting.
- **Invite prime candidates to a group session** to interact with your current sales team where you can observe how the candidates impact current team chemistry. Rather than just having your current staff scrutinize the candidates, try role-playing exercises or strategic sales activities so you can assess the candidates’ knowledge, personalities, and interpersonal skills.
- **Select your top candidates and personally invite them to speak with you.** If you have trouble connecting, send them a packet of individualized information or ask them to visit a personalized URL; the site can include a facilities tour, a video introduction/invitation, a personalized podcast and more. This kind of “jobcasting” can show the candidate that he or she is valued, and that your company takes a creative approach to getting what it wants!
- **Consider past job candidates** to see if someone you didn’t hire previously is a good match for your current requirements. For example, let’s say you didn’t hire someone a few years earlier because their experience level was lacking. Guess what? They now have more experience! Seek them out and see if they are available and interested.
- **Offer a finder’s fee or other incentive to current employees** if you end up hiring someone they refer. However, set the expectation that a fee is paid only if the new hire stays on the job a specified minimum time.





Writing a Better Sales Job Description

With your sales position defined and your recruiting channels selected, you will need to craft an ideal candidate profile to enable you to target potential sales candidates that are right for the open position. Opting to post a job listing for a sales position is not a recommended approach for finding top sales talent, as many times the applicants are unemployed, lower performers.

If you do post the job, the nature of this content may vary somewhat based on the channel you use, but in general, the best techniques for writing effective job listings are the same as for other forms of advertising. In this case, the job is your product and the readers of the job post are your potential customers. **Remember: the aim is to attract interest, communicate clearly and concisely the essential points, and to provide a response process.** Here are some ways to sharpen the focus of your ad so that it only draws in qualified candidates:

- **Showcase what you have to offer:** Feature irresistible hooks in the top half of the ad.
- **Emphasize the person you want:** When looking to hire a new employee, think like a job hunter and write your ad based on skills, talents, qualifications, and experience. Focus on the person you want, not the job you have to fill.
- **Keep it short:** Do not use too many words. Keep sentences short. (No more than fifteen words in a sentence.)
- **Help readers envision themselves in the role:** Refer to the reader as “you” and suggest their involvement and responsibility (“your” and “yours”) when describing job requirements and candidate expectations.
- **Use simple language:** Use the language your reader uses. Industry jargon is acceptable, but focus vocabulary on words found in a typical news article.

- **Use the correct job title:** Develop a job title that is literal, not creative. The days of catchy headlines and obscure job titles are long gone. Imagine someone trying to find a role as a Business Development Representative. Would they even recognize the position if the headline read “Engagement Manager Wanted?” Probably not.
- **Be Specific:** While brevity is a much-appreciated art, it is also important to be specific and transparent. Vague descriptions make it difficult for potential applicants to imagine themselves in the role, if they would enjoy it, or even if they are qualified in the first place.

Key responsibilities, skills, qualifications, location, salary range, benefits, and company culture are still important components of a job posting, but if you don’t draw the reader in with a carefully crafted message, the specifics of what you have to offer will never be read.

ATTRACT INTEREST
COMMUNICATE CLEARLY
AND CONCISELY
PROVIDE A RESPONSE
PROCESS





Using the Right Methods and Tools to Select the Best Candidate for Hire

It can be tempting to “go with your gut” and let your instincts drive hiring decisions. In fact, in the recent past this might have been as reliable a method as any – provided you are keenly perceptive about people and their visual and verbal cues. But today, there are so many scientifically sophisticated and proven job candidate assessment methods and tools available that you owe it to yourself and the success of your company to at least consider them. (You’ll be in good company, too, as it has been reported that more than 90% of Fortune 500 companies use such tests.)

Applicant Tracking Systems

Online application systems can be maddening for the applicant but valuable for the hiring organization. Such tools can go much deeper than merely being a job candidate’s interface. These tools can be useful as they help your organization analyze, track, and strategize when it comes to your overall talent acquisition and management processes. Naturally, there are too many ATS solutions to fully explore in this eBook – including entries from Oracle, Bullhorn, IBM, iCIMS, and others – but there is an abundance of information available online for researching applicant tracking systems.

Personality, Psychological, Behavioral, and Skills Assessment Tools

Assessment tools such as the Myers-Briggs Type Indicator [MBTI®], DiSC®, and the Wonderlic Cognitive Ability Test, have been around a long time. Wonderlic alone has been used for more than 75 years. Today, there are more such programs than ever, including some uniquely geared to assess aptitude for specific types of professional areas. As with applicant tracking solutions, there are too many to fully explore here; however, Breakaway Sales Recruiting is an independent PXT Select™ Authorized Partner due to the value this assessment has proven in evaluating sales candidates and comparing them to current successful sales team members.

If you use such tests for new hires, do the same for current employees. The results will give you insights for more successful interactions and management. Also, you will be able to profile your top performers and look for similar results in the testing of applicants.

Social Media Checks

Social media can be very revealing. Many job applicants have probably come to regret “oversharing” on Facebook, Twitter, Instagram, etc. While you should not hold it against a candidate for being human or even holding different opinions than you, it is reasonable to use available social media channels to see what the candidate openly shares with the world. If that public profile is not consistent with the professional presence you expect from your employees and want made available to your clients, you will want to take that into consideration.

Caution: do not use an applicant’s information against him or her if the disqualifying information falls under a codified protected class designation in local, state, federal, civil, or human rights ordinances.

Background Checks

Likewise, before making the hire, spend the extra time and money to perform a thorough background check. Finding out beforehand if your candidate has an unreported and relevant criminal history could save you much time, trouble, and money in the long run.



Polished interviewers, however, do not let candidates get by with just stock answers to stock questions. Instead, they know that when conducting an interview, it is important to get the candidate “off script” by digging deeper with follow-up questions: “Why do you believe that to be true?” or “Tell me how you accomplished that,” and similar.



The Interview

A study conducted by professors in the Michigan State School of Business recently discovered that employment tests and assessment tools were more accurate than applicant interviews. (They found that interviews were only good indicators of future success in the position 12-20% of the time.) Nonetheless, interviews are and should be a part of the applicant evaluation process. After all, the first time you speak with a candidate should not be their first day of work, right?

Conducting a skilled – and legal – sales candidate interview is both art and science. Some Sales Managers and company leaders are excellent interviewers who relish the opportunity to get to know job candidates in this scenario; others hate it with a passion and would rather have teeth pulled than have to interview a prospective salesperson.

In larger organizations, HR professionals conduct at least preliminary interviews, but it ultimately comes back to the hiring manager to learn more in a one-to-one situation. At its most basic, a sales job candidate interview is a planned conversation, with certain questions that need to be asked and answered. Polished job candidates typically come prepared with answers to anticipated questions, at times coached by recruiters or headhunters who are eager to collect their fee following a successful hire. Polished interviewers, however, do not let candidates get by with just stock answers to stock questions. Instead, they know that when conducting an interview, it is important to get the candidate “off script” by digging deeper with follow-up questions: **“Why do you believe that to be true?”** or **“Tell me how you accomplished that,”** and similar. This is how conversations begin, how true discoveries are made, and how real relationships are forged.





Making the Job Offer

Hiring is indeed a process, but it is not complete, of course, until you make a job offer to your selected candidate, and the offer is accepted. To bring your preferred sales job candidate onto your team, make sure you follow these guidelines when offering the chosen candidate the position:

- **Extend the offer personally** (do not make this an HR function unless corporate policy demands it) – remember, you are the one who has already established rapport with the candidate.
- **Make the offer in writing**, with all terms clearly spelled out. These will include the compensation plan as well as benefits, perks, relevant performance expectations and policies, vacation time, etc.
- **Give examples** to illustrate the incentive plan, including bonus and commission structures.
- **Negotiate only if it truly makes sense** and falls within the scope of your budget and organizational dynamics. If your offer is consistent with market and industry benchmarking as well as pay ranges for your sales department, negotiation should be rare.
- **Have the new hire sign the offer** and the compensation plan to affirm their understanding.
- **Arrange for a start date**, and have the new hire let you know when “notice” is given to their current employer. Sometimes, this notice triggers the current employer to match or exceed your offer and the employee ends up staying put.





Final Considerations

After the hire is made, make sure your current team and anyone involved in the onboarding process are fully aware of the upcoming start date and their specific roles in making the new salesperson feel welcome and enabling them to become productive as soon as possible. From there on, you will be able to manage this employee – along with your other solid performers – within your highly effective sales structure!

Conclusion

Executing the hiring process effectively requires diligence and attention, as well as recognition that it is just that – a process. Each moving piece contributes to the success of your new salesperson, and ultimately, your company. Finding the perfect fit takes planning and management at each turn, from properly defining the sales position to be filled, to determining where and how to market the job post in order to attract top candidates, to selecting the best candidate, making the job offer, and finally, successfully onboarding your new hire.

As you move through the hiring process, special consideration should be given to the time spent onboarding your new employee. Affirming their decision to join your company through an organized, well-constructed onboarding plan will help them to feel prepared, hit the ground running, and start driving revenue.

No other process in your business can so easily make or break your company's success, and ultimately the effort you put in upfront will save you time and money in the long run. Returning to the wise words of Peter Drucker, "If you want something new, you have to stop doing something old." Embracing a comprehensive hiring process including an onboarding mechanism is the "something new" that will attract and retain the best sales talent for your company.



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