2022 EDITION

THE STATE OF

SALES TRAINING & ONBOARDING

Spekit

DEMAND METRIC

INTRODUCTION

The world of sales has changed forever. What hasn't changed is the need for leaders to find and hire exceptional sales talent, get their team ramped up, and selling as quickly as possible, while retaining their top performers for the long haul.

Unfortunately, the transition to remote or hybrid onboarding experiences has put more pressure on sales leaders than ever before, many of whom have entered unchartered waters. This digital transformation, coupled with a new generation of sellers whose learning styles and preferences have evolved, has created the perfect storm for sales leaders.

This year, Spekit and Demand Metric partnered to explore the impact of delivering an exceptional modernized onboarding and training experience from the perspective of sales and revenue leaders, reps, enablers, and operations teams.

This study shows the importance of moving away from antiquated onboarding and training approaches and how sales leaders who refuse to get with the times will inevitably suffer.

The following report summarizes the results of this year's survey and shares practical insights from over 400 sales teams that will help you get reps selling faster and retain them for longer. For more details on the survey and its participants, please refer to the Methodology.

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SECTION #1

KEY FINDINGS

KEY FINDING #1

Sales reps will leave their job if the training or onboarding experience is poor.

47% of account executives have left a sales job due to a lack of training or a poor onboarding experience.

KEY FINDING #2

Learning preferences have evolved.

Only 31% of sales reps like to learn by taking online courses (LMS), compared to 75% of reps who want to learn by “doing.”

KEY FINDING #3

Sales reps spend too much time searching for information they need to do their job.

The majority of reps spend 3-11 hours (or more) each week searching for answers to questions about the tools, processes, or information (i.e., updating the CRM system, executing sales cadences, etc.).

KEY FINDING #4

Sales leaders recognize the relationship between hiring, onboarding, and revenue growth.

Almost all (94%) sales leaders report that the hiring and onboarding process is critical or important in enabling sales reps to hit their targets.

KEY FINDING #5

Sales leaders must ensure that reps start off on the right foot.

Top sales performers are nearly 3X more likely than poor performers to report their onboarding experience was good or excellent.

KEY FINDING #6

Sales leaders are rolling out new processes that aren't being followed.

Over half of sales leaders have rolled out a new sales process or methodology in the past four months, but only 16% are very confident that reps are following them.

SECTION #2

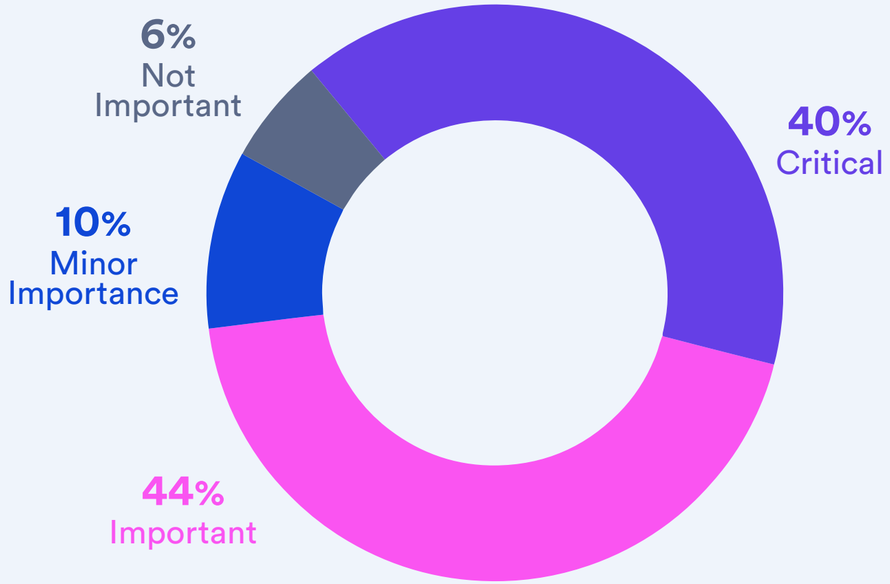
ONBOARDING, TRAINING, AND SALES PERFORMANCE

Sales leaders recognize the importance of hiring and onboarding.

Businesses must do everything possible to enable their sales teams, but ensuring new sales reps hit their targets quickly begins long before an official job offer gets sent. Almost all (94%) sales leaders report that the hiring and onboarding process is ‘critical’ or ‘important’ to enabling sales reps to hit their sales targets, as **Figure 1** shows.

Figure 1

How important is the hiring and onboarding process to enabling sales reps to hit their sales target?



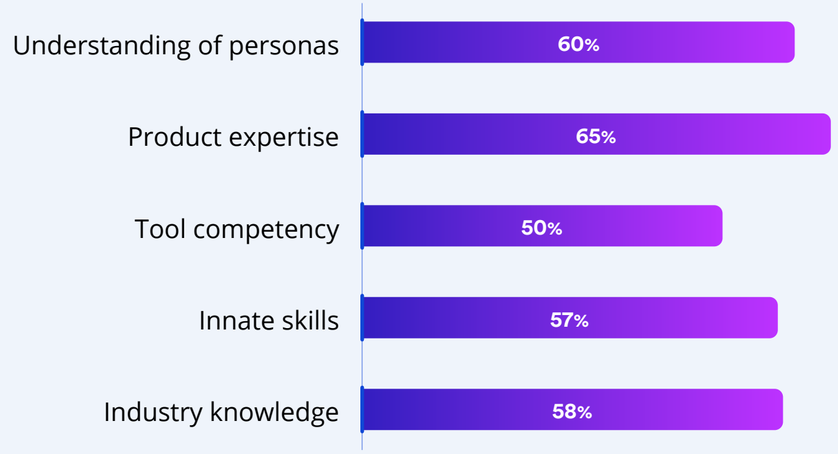
There is no single predictor of sales rep success.

Selecting the most suitable sales candidates is vital to the success of any organization, and when the right salespeople get hired, revenue follows. Unfortunately, sales leaders agree that there isn't one single factor that will help them predict the success of new sales hires, as **Figure 2** shows.

However, further analysis of this study's data revealed that sales leaders with high retention rates (>75%) were more likely than those with low retention rates (<74%) to acknowledge the importance of all the factors listed, the most significant delta being tool competency.

Figure 2

Which factors do you believe are the best predictors of sales rep success? Check all that apply.



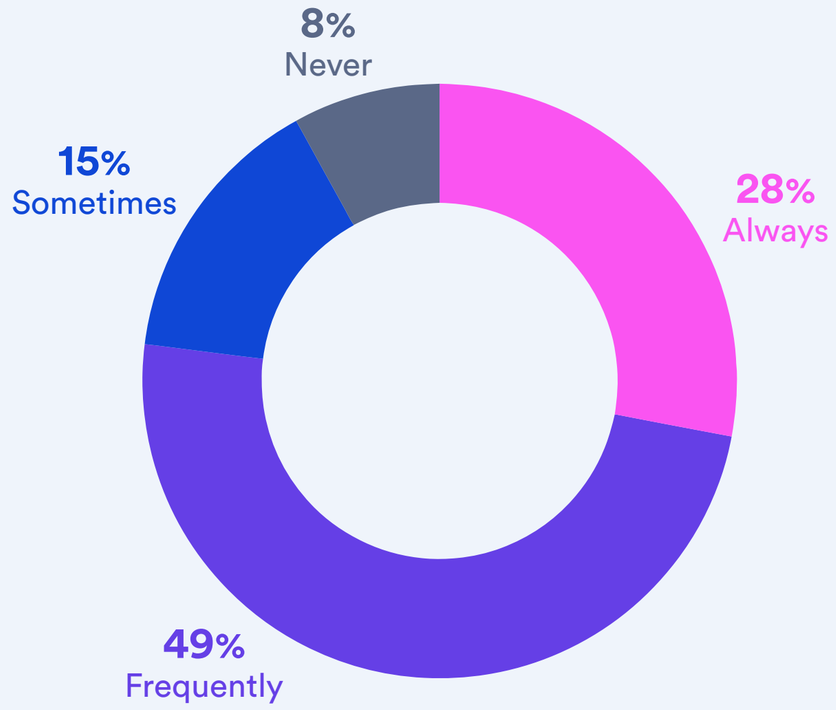
Very few reps always hit their sales target.

Successful businesses can't afford to waste a seat they could otherwise fill with someone who can deliver sales results. The time invested in training and overhead makes poor performers an expensive liability to any organization, and sales reps who don't consistently hit their target do not last long.

Surprisingly, only 28% of sales reps report they always hit their sales target or quota, as **Figure 3** shows. Sales leaders, therefore, must do everything in their power to ensure these top-performing reps stick around for the long haul.

Figure 3

How often do you hit your sales target/quota?

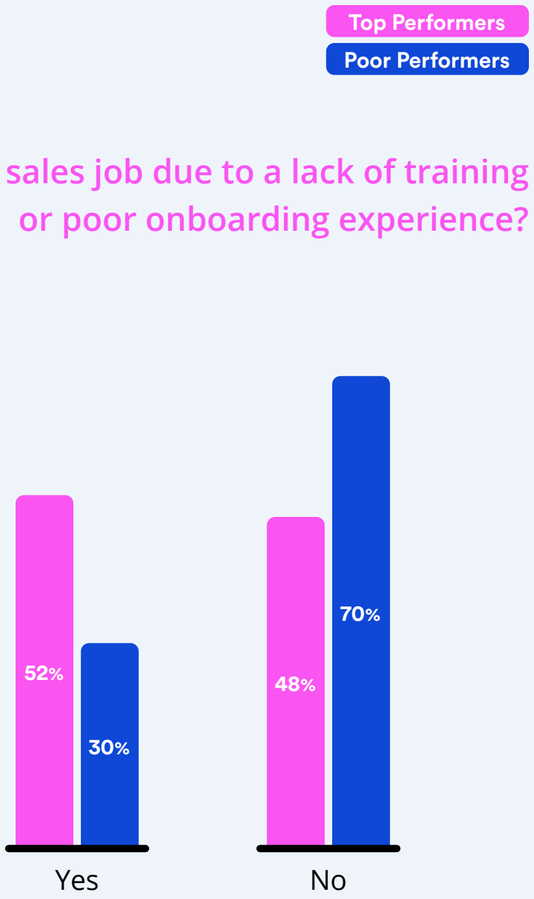


Sales reps will leave their job if training and onboarding are poor.

Most sales leaders struggle with high turnover, and the experience that new reps receive when they first start can significantly impact retention. With so much turnover in sales and low tenure, it's more important than ever to optimize training and onboarding to keep the high performers.

Overall, 47% of account executives report leaving a sales job due to a lack of training or a poor onboarding experience, and top performers are much more likely than poor to have left a sales job for these reasons, as shown in **Figure 4**.

Figure 4



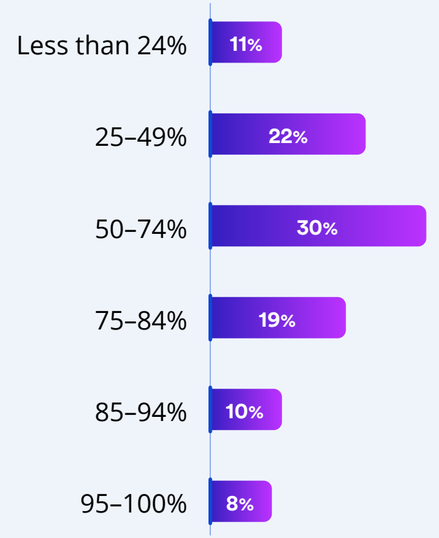
Sales leaders must manage incredibly high churn rates.

Sales leaders can't afford to deliver a bad onboarding experience. If they do, sales reps will leave and all of the time and money invested into training goes out the window. Unfortunately, the threat of churn is a reality for most sales leaders, and it remains a significant issue in many organizations.

This study found that only 8% of sales leaders report that most sales rep hires (95–100%) stick around for longer than one year, as **Figure 5** shows. Those who want to keep their teams together must step up their game by ensuring a smooth onboarding experience that sets reps up for success, so they want to stick around.

Figure 5

What percentage of new sales rep hires stick around for longer than 1 year?

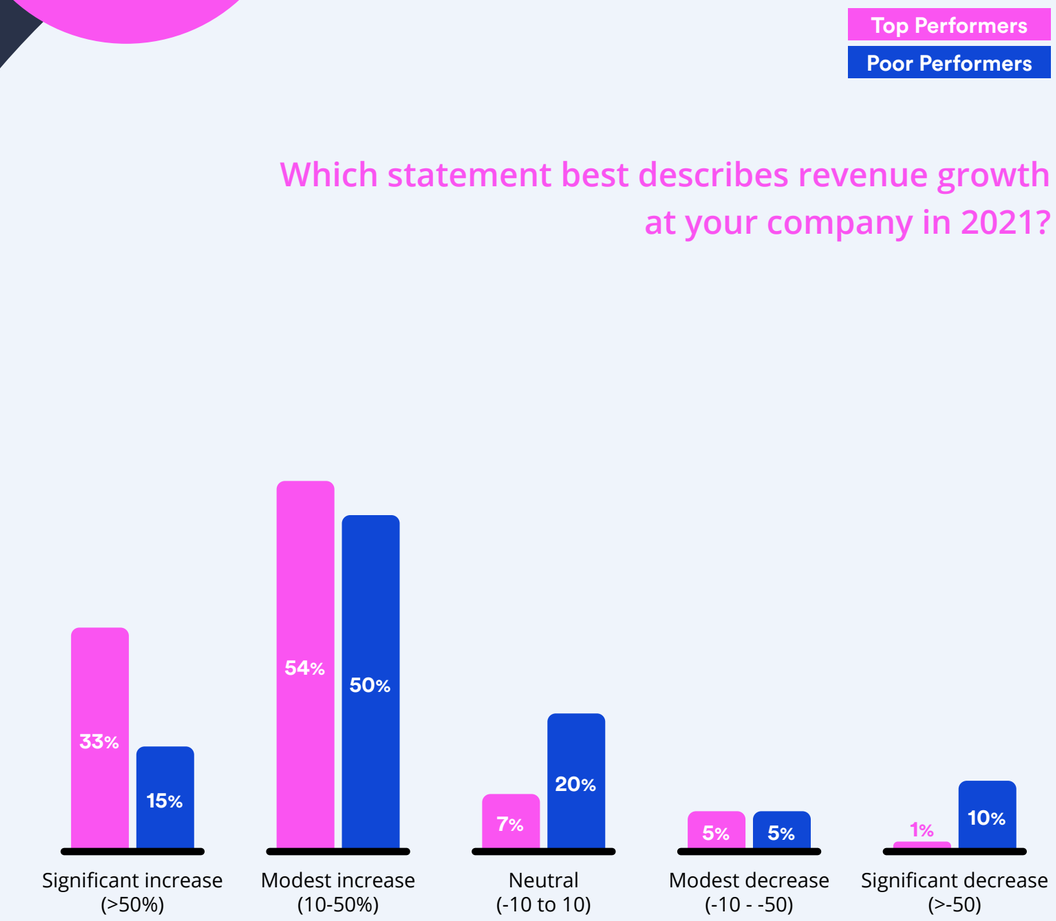


Retaining sales talent is crucial for achieving revenue growth.

The benefits of keeping sales reps extend far beyond team morale. This study found a strong relationship between the performance of sales reps and revenue growth. When sales numbers are good, it creates a win/win for sales reps and the company, resulting in substantial commission checks and more money.

As **Figure 6** shows, sales leaders have a strong incentive to retain top performers, as they are over 2X more likely than poor performers to be part of companies that have achieved significant revenue growth in the last fiscal year (>50%). Unfortunately, great reps will leave companies that don't provide the onboarding, training, and ongoing support to do their job effectively.

Figure 6

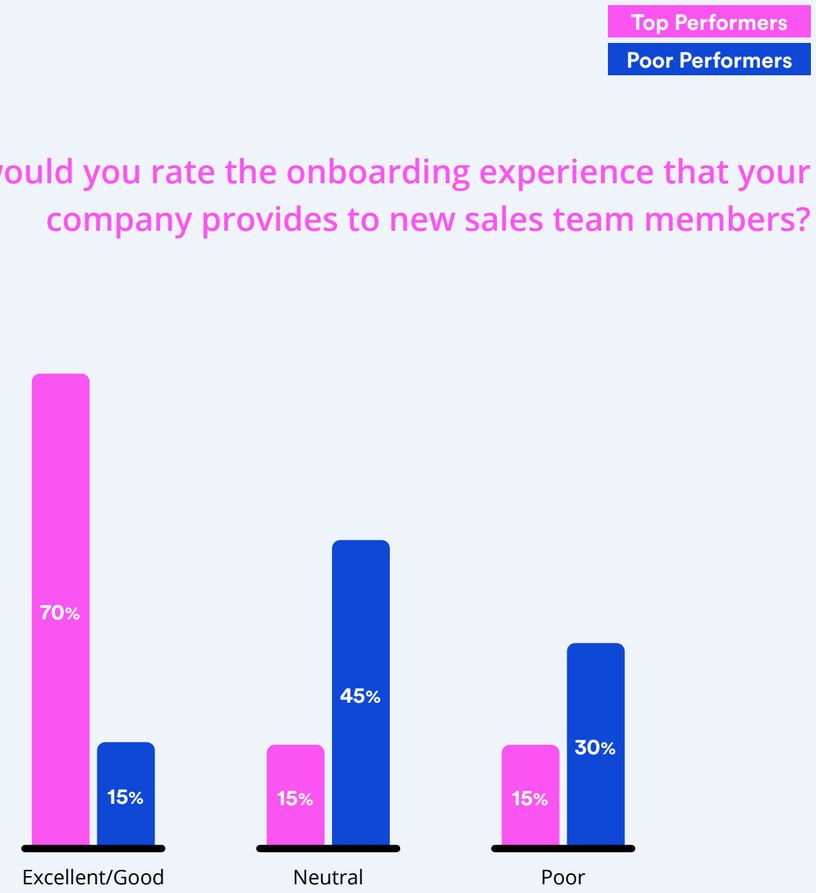


Most top performers had a good or excellent onboarding experience.

One of the key objectives of this research was to understand the relationship between the onboarding experience and sales outcomes. This study's results confirm the validity of the research hypothesis: **The quality of the onboarding experience that sales reps receive is vital to their success.**

Top performers are nearly 3X more likely than poor performers to report their onboarding experience was good or excellent, as **Figure 7** shows.

Figure 7



When it comes to onboarding, the status quo isn't working.

It's taking businesses too long to get reps selling, and even top performers are struggling to hit their quota in the first year. However, poor performers are 5X more likely than top performers to report they aren't fully onboarded and productive in their sales role after year one, as shown in **Figure 8**.

It costs a lot of time and money to carry reps while they are ramping up, and sales leaders who can't onboard productive reps quickly need to examine why. If new sales reps aren't producing until after their first year, the training they receive clearly isn't cutting it, and it's time for those leaders to take a closer look at their process and the technology they use.

Figure 8

SECTION #3

SALES PROCESS, TOOLS, AND ENABLEMENT

A tremendous amount of time is spent each week supporting reps.

Regardless of your role in the organization, time is a valuable asset, and few people are more pressed for time than sales leaders. This study found that over 70% of sales leaders spend four or more hours each week answering questions about the tools, processes, or information that sales reps need to do their job, as shown in **Figure 8**.

When sales leaders get bombarded with questions from their team about things they could otherwise find answers to on their own, like updating the CRM system and executing sales cadences, it wastes valuable time they could be spending on coaching.

Figure 8

How much time do you personally spend each week answering questions about the tools, processes, or information that sales reps need to do their job (i.e., updating the CRM system, executing sales cadences, etc.)?

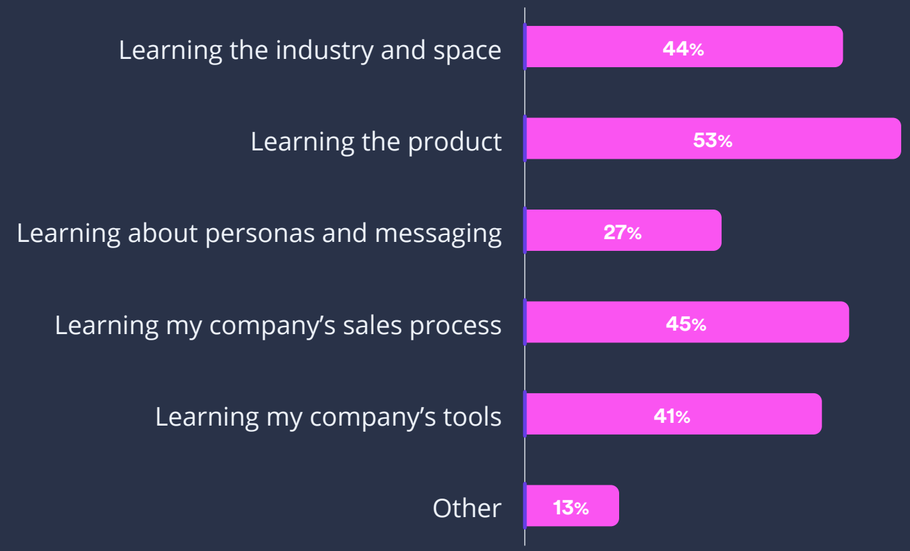
Sales reps have a lot to learn.

There's more complexity in the sales process than ever before. As a result, sales reps have more information to process in less time. Although over half of sales reps believe the most challenging part of learning their job involves the product (**Figure 9**), understanding a company's sales process and tools is just as tricky and important.

Since all businesses are different, teaching new hires about the product, industry, and space will vary from one company to the next. The remainder of this section will share lessons about how sales leaders can optimize processes and tools and how to enable reps so that they can reach their full potential.

Figure 9

What are the hardest parts of learning your job? Check all that apply.



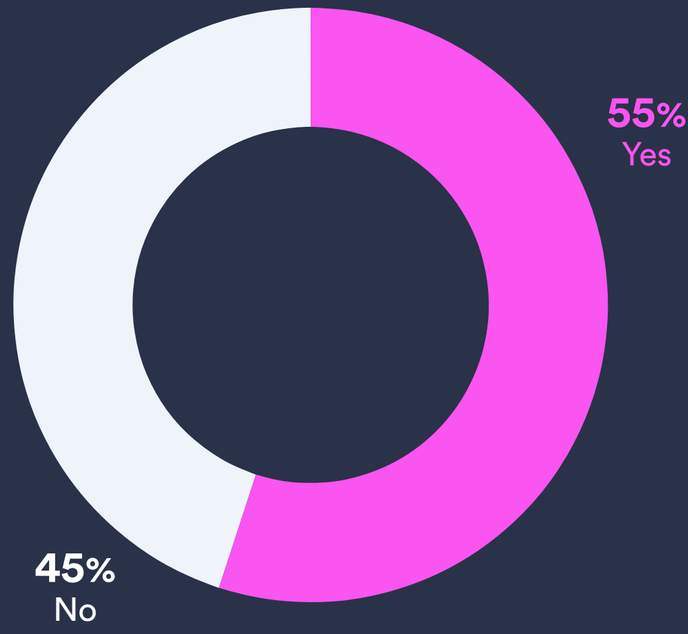
Most sales leaders have rolled out a new process or methodology recently.

When a company doesn't update its sales motions, it's typically because they believe the process is working like a well-oiled machine, and everything is fine. In reality, very few companies can thrive or survive if they don't optimize their process by improving it over time, even if the changes are minor.

It turns out that changes to the sales process happen more frequently than one might expect. This study found that over half of sales leaders have rolled out a new sales process or methodology in the past 120 days, as **Figure 10** shows.

Figure 10

Has your company rolled out a new sales process or methodology in the past 120 days?



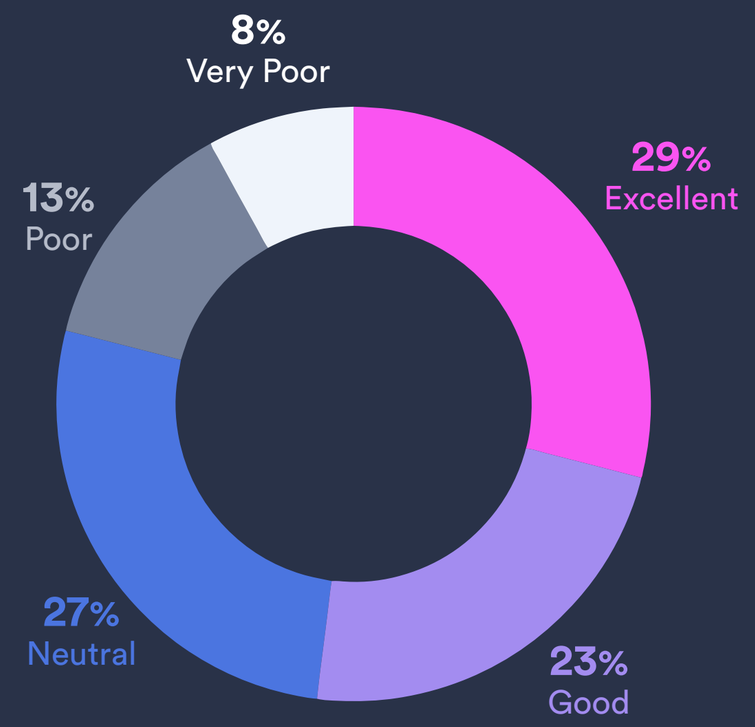
Few reps would describe the roll out of their new process or methodology as “excellent.”

Creating a new sales process or methodology is one thing; both take time and careful planning. Ensuring a new sales process or methodology is adopted by the reps who have to execute takes time and careful planning, and the experience that leaders provide during the rollout can make it or break it.

This study found that only 29% of sales reps would describe the rollout of their new sales process or methodology as "excellent," as shown in **Figure 11**. Sales leaders need to step up their game when rolling out changes to the sales organization, which begins with understanding how reps want to learn and leveraging technology that allows them to deliver training in a modern and effective way.

Figure 11

How would you describe the most recent rollout of a new process or methodology from your perspective as a sales rep?



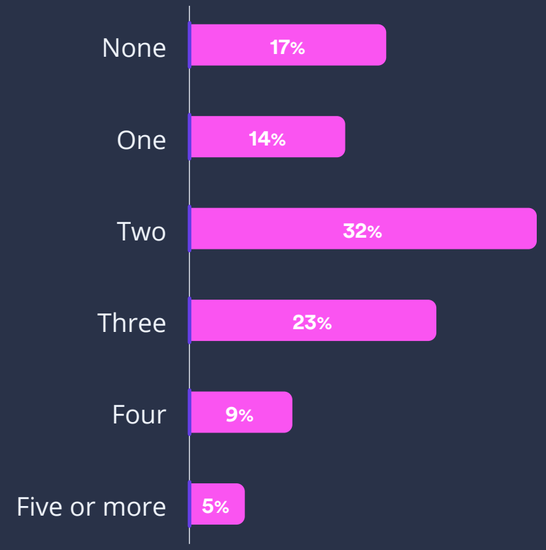
Most sales leaders added several new technologies last year.

The proliferation and widespread adoption of sales technology is old news. Any sales leader who has logged into LinkedIn or recently picked up a cold call likely got pitched on the latest and greatest in SalesTech.

The irony is that salespeople aren't just selling; they are also being sold to. This study found that sales teams rolled out more than 2 new tools or technologies last year, with 83% of sales leaders reporting they added at least one new technology to their stack, as **Figure 12** shows.

Figure 12

How many new sales tools or technologies have you rolled out in the last 12 months?



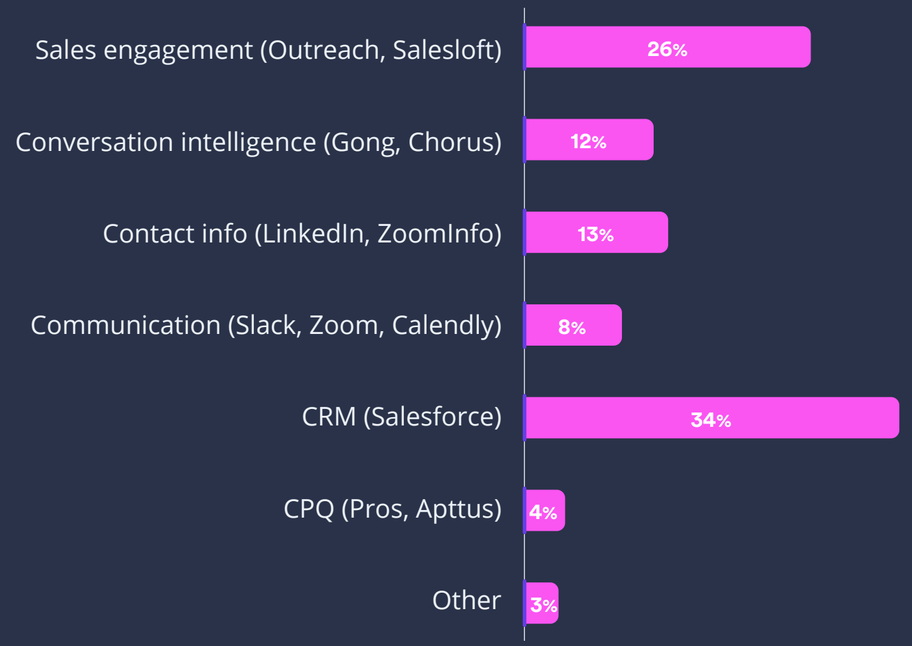
Salesforce requires the most training.

Salesforce is a necessary evil at most companies. There's no doubt that it's a fantastic solution for managing customer and prospect data. However, a CRM solution is only as good as the data that resides in it, and ensuring that sales reps update the CRM has been a perennial issue for sales leaders since it was first introduced in 1987.

So, it's no surprise that a CRM system deserves some special attention. Sales leaders report that Salesforce requires the most training of all technologies included in this study, followed closely by sales engagement tools like Outreach and Salesloft, as shown in **Figure 13**.

Figure 13

Which digital tool requires the most training?



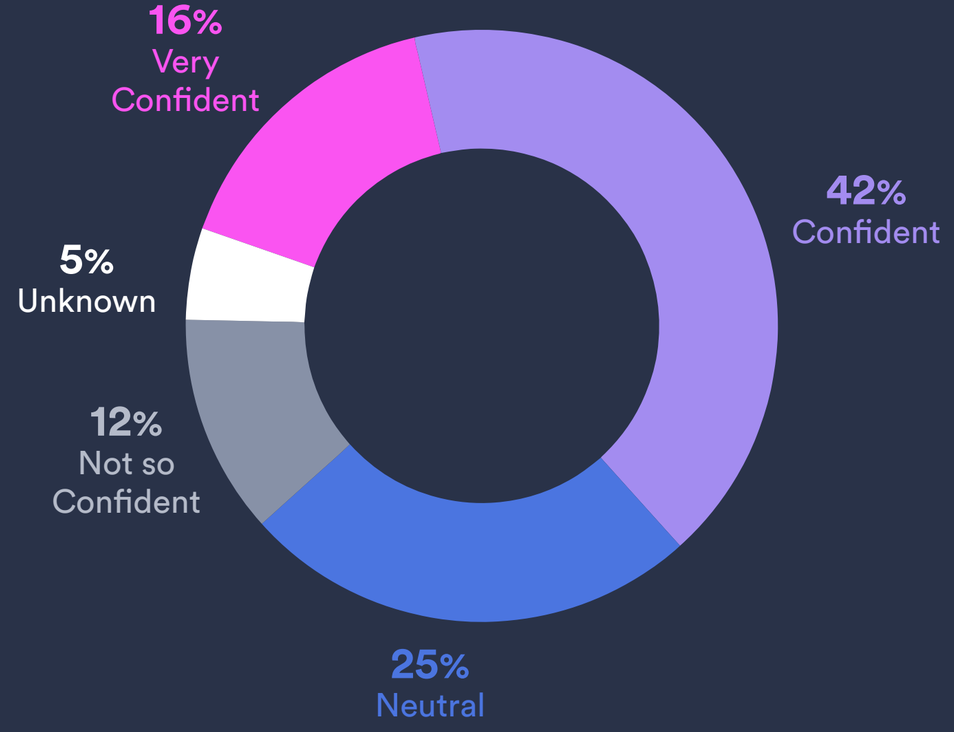
Reps struggle with following Salesforce processes.

One of the most critical jobs of sales leaders is to ensure reps follow the processes they design. However, only 16% of sales leaders are very confident that reps are following SFDC or CRM processes, as **Figure 14** shows.

This single finding should cause alarm bells to go off in any sales leader's head. Sales reps must follow SFDC processes closely so that leaders can gain vital insights and make educated decisions. If sales reps aren't following the established processes, the decisions that leaders make will be misinformed, and the outcome can be catastrophic.

Figure 14

How confident are you that your reps are following SFDC or CRM processes?



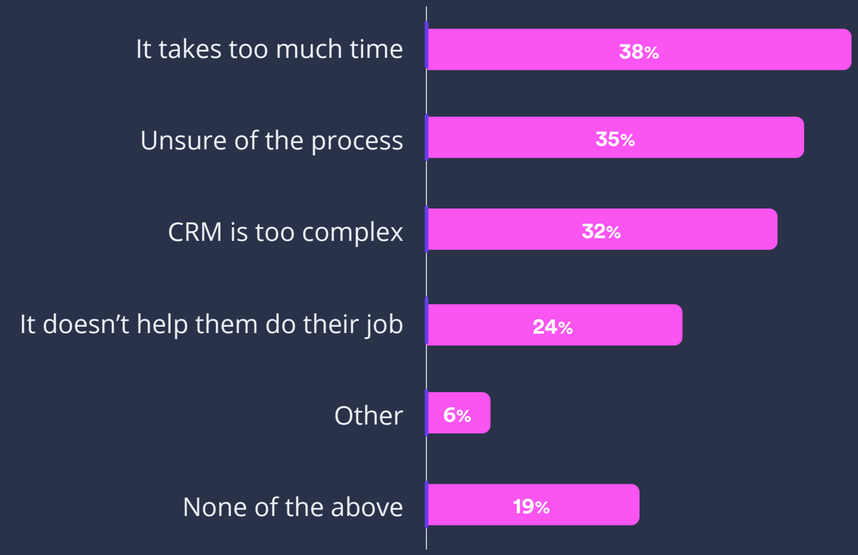
The obstacles to entering accurate Salesforce data are preventable.

Any good sales rep would prefer to focus their time and energy on executing sales activities and not data processing. Ironically, most sales leaders recognize this desire and want the same thing. However, most reps believe it takes too much time to enter data into Salesforce, and a lot of this belief stems from the need for simplification and optimization.

This study shows that 35% of sales reps are unsure about entering data in Salesforce correctly, which inevitably leads to poor quality forecasting, as shown in **Figure 15**. It's in the best interest of sales leaders, reps, and the company as a whole, to further enable reps by reducing the time it takes to enter this valuable data without additional training or intervention.

Figure 15

What is preventing your sales team from entering more accurate data into your Salesforce CRM? Check all that apply.



Sales leaders who leverage Spekit as part of their sales enablement stack were **40% less likely** to report that reps are unsure of the process than teams that only use an LMS.

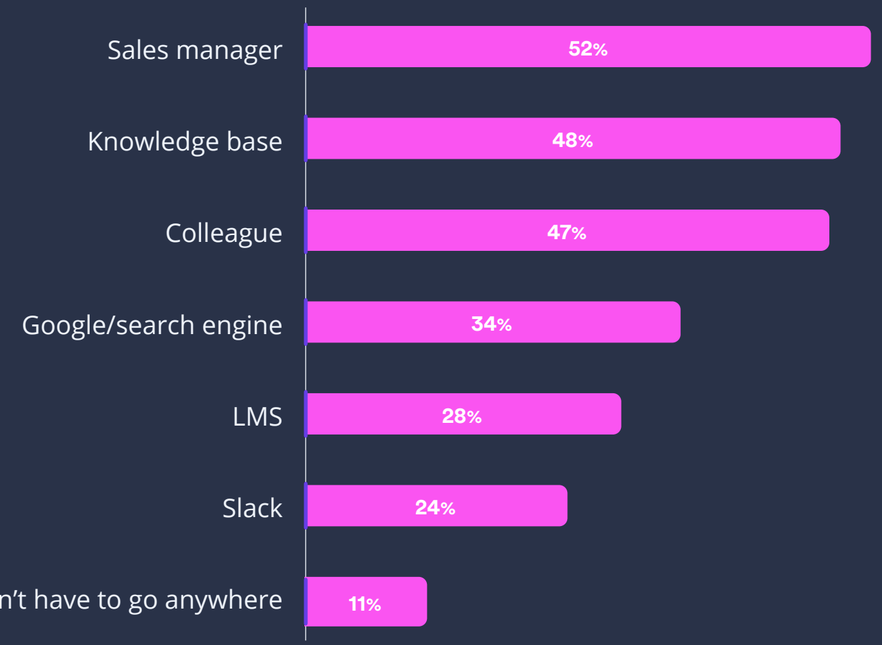
Sales managers continue to be the go-to resource for account executives.

Sales reps still rely heavily on managers and other team members when they need answers to questions about the tools and processes or seek information to do their job. This dependence on other team members wastes a lot of time and causes frequent interruptions to the sales managers, enablers, and reps who get asked repetitive questions.

Despite all of the time, effort, and money spent on training, there is still not a lot of self-sufficiency for sales reps, as **Figure 16** shows. Leaning on other team members is very inefficient, and the issue gets exacerbated in remote environments, which has become the post-pandemic norm.

Figure 16

Where do you go to find answers to your questions about the tools and processes, or seeking information you need to do your job? Check all that apply.



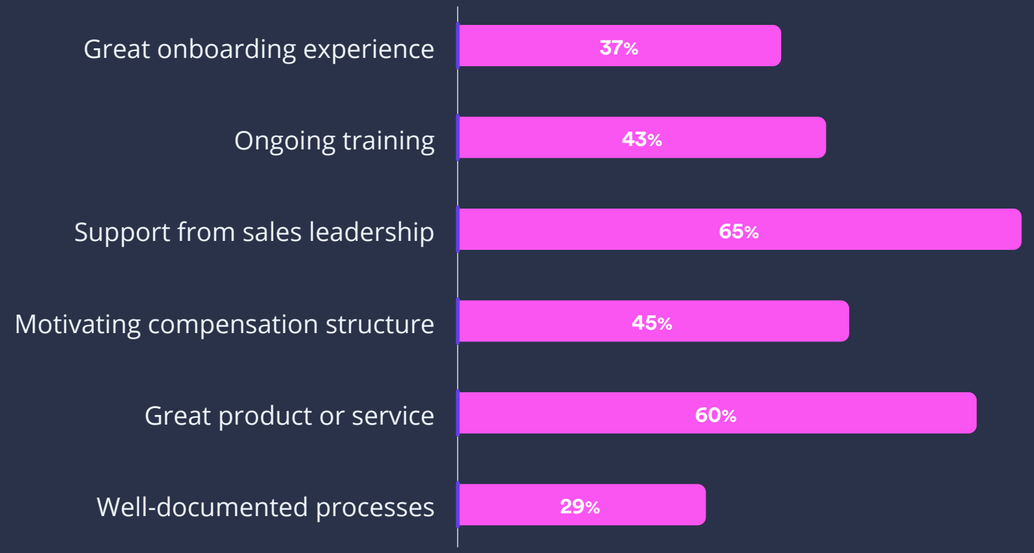
Support from sales leadership is a key success factor.

This study found a strong relationship between the support that leaders give to reps and sales results. Nearly two-thirds of sales reps who always or often hit their sales target attribute their success to support from sales leadership, as **Figure 17** shows.

Sales leadership support is vital in any organization, but the support that leaders provide can come in many different forms. Traditional, old-school thinking requires leaders to sacrifice time to support their team. While time is undoubtedly a crucial factor, leaders willing to experiment with modern onboarding and training approaches can enable reps at scale in less time.

Figure 17

What factors have contributed to your ability to always or often hit your sales target? Check all that apply.



SECTION #4

DELIVERING AN EXCEPTIONAL SALES REP EXPERIENCE

(in less time, with better results)

STEP 1

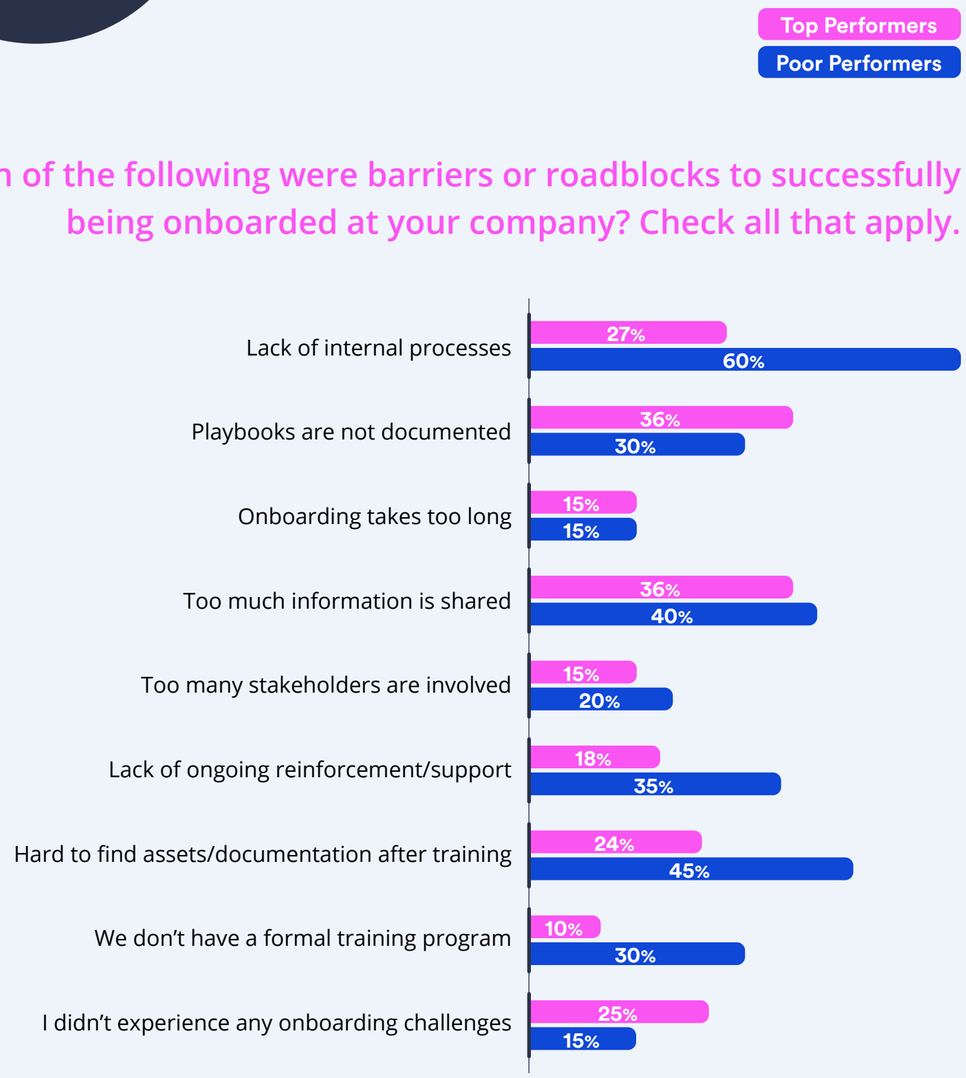
Identify and Tackle Onboarding Challenges.

Sales leaders must understand why the onboarding process is failing reps and how to improve it.

Fewer than one-quarter of new sales reps would say their onboarding experience was excellent. A big part of why account executives aren't satisfied is because most (75%) report at least one barrier or roadblock.

As **Figure 18** shows, the top barriers to successful onboarding were sharing too much information, undocumented playbooks, and a general lack of internal processes.

Figure 18



Most organizations see the development and build of a new or optimized sales process as the hard work. The months it takes to scope, interview, validate, and the initial deployment are very straining on the organization, so there is a massive sense of relief and excitement around the launch.

But the reality is, that is step 0. The real work begins when integrating the day-to-day and the change management push from frontline leaders to drive home the change. What happens after the build and deployment matters the most, but usually it's about 5-10% of the project plan.

Jake Dunlap
CEO, Skaled Consulting

Creating a solid process for reps to follow requires time and effort, but it is table stakes — a minimum requirement for any sales leader — and when reps start their role with well-defined processes in place, results follow.

Top performers are over 2X less likely than poor performers to struggle with a lack of internal processes when they first start.

However, onboarding new sales reps won't happen overnight, even with established processes. The journey that sales reps take when joining a new company requires continued support and must be part of the leader's overall strategy.

STEP 2

Cater to "new school" learning preferences

Sales leaders need to recognize how reps learn has evolved.

The world's best sales reps not only recognize the importance of ongoing training, they demand it. As this study shows, sales leaders who deliver a great onboarding and training experience improve their chances of retaining top performers — those who don't risk leaving money on the table.

However, sales training is often a double-edge sword. Sales reps know they need training, but it's often abandoned out of necessity for speed, convenience, and short-term gain because salespeople need to sell.

Becasue three-quarters of account executives like to "learn by doing," it's time for sales leaders to rethink their training process and create programs that complement how the human mind learns, retains, and grows.

Figure 19

> The way we work is broken, but the way we train is also broken. Sitting down in a classroom or joining a Zoom meeting for an hour to learn something isn't how we behave anymore.

Dr. Shannon J. Gregg
President of Cloud Adoption Solutions

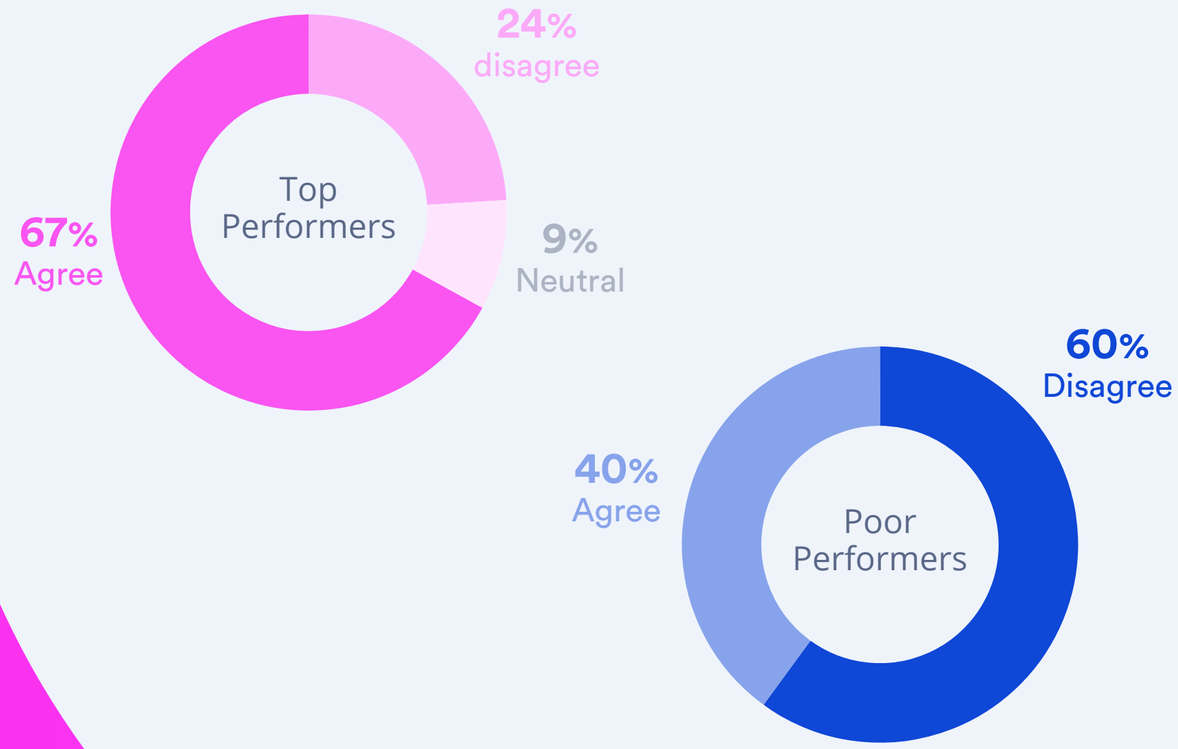
For training to be impactful, it needs to be convenient and readily accessible to reps while limiting any disruption to their sales motions, and that's where heutagogy, or self-directed learning, comes into play.

Self-directed learning does not always occur in a straight line; it allows reps to upskill in new situations and, more importantly, understand how to find what they need. As **Figure 20** shows, top performers are more likely than poor performers to report the technology they use for onboarding and training is easy to use.

Those who want to provide a better self-directed learning experience must modernize how training gets delivered and prioritize usability. When leaders build pragmatic programs that cater to the human mind's needs, knowledge retention will increase, and overall satisfaction will improve.

Figure 20

"The technology we have adopted to deliver onboarding and ongoing training is easy to use."



STEP 3

Meet sales reps where they are

Sales leaders must enable reps anytime, anyplace.

Few sales teams have gone back to the office full time, and most don't plan to return anytime soon, which has caused significant disruption to how training is delivered.

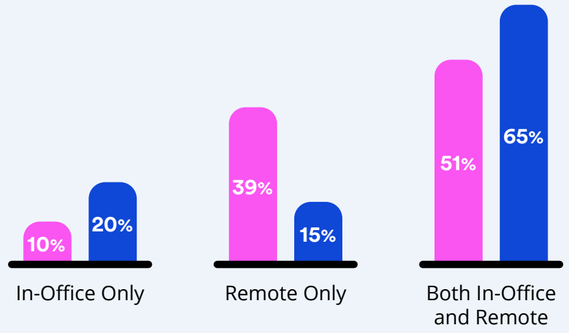
Fortunately, remote training does not seem to have impacted all reps equally. As **Figure 21** shows, top performers are 2X more likely to thrive in a remote training environment than poor performers.

But, further investigation of this study's data revealed more to the story. Sales leaders have enabled top performers who work remotely in different ways, and one key to their success involves self-sufficiency.

Figure 21

Top Performers
Poor Performers

How is onboarding and training delivered at your company?



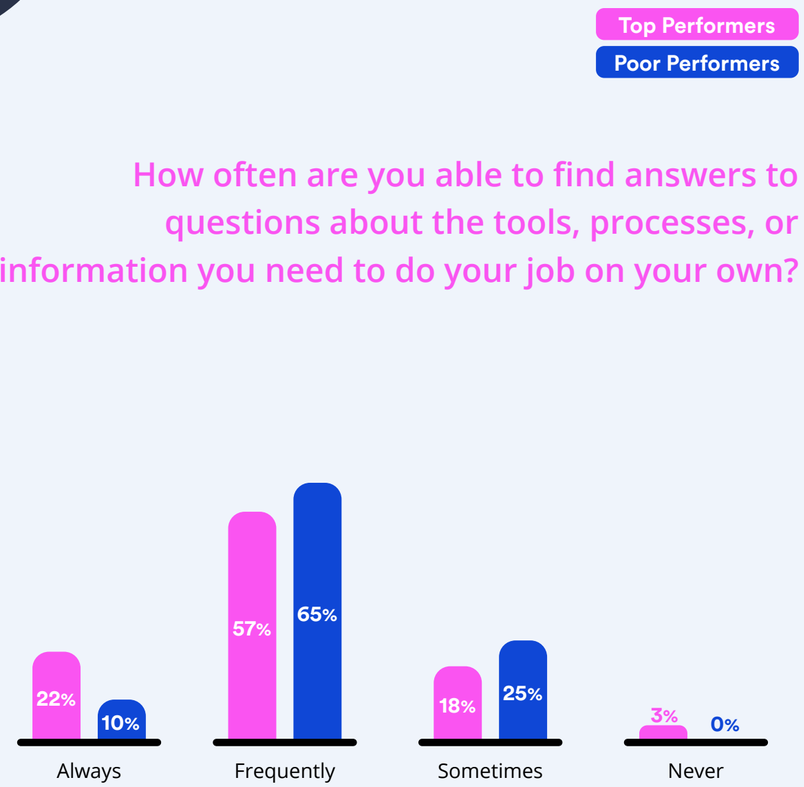
As this study shows, sales reps waste a considerable amount of their own time, their manager's time, and their peer's time, asking questions about things that should be easily accessible.

However, top performers are 2X more likely than poor performers to report they can always find answers to questions independently, as shown in **Figure 22**.

Whether reps have questions about updating the CRM system, executing sales cadences, battle cards, or RFPs, salespeople need to find what they are looking for by themselves, and it's up to sales leaders to make that a reality.

Traditionally, sales reps have leveraged on-demand training to learn the ropes and reduce the time managers, and other team members spend answering questions.

Figure 22



Unfortunately, using a learning management system (LMS) didn't rank well among this study's participants; only 31% of sales reps report they like to learn by taking these types of courses online.

The reality is that there is a better way to learn. Sales leaders who take a hybrid approach that includes a "just-in-time" component will thrive in all types of training environments, in-person, fully remote, or hybrid.

Giving reps access to what they need when they need it dramatically reduces the need for antiquated on-demand and human-to-human support while taking a massive burden off everyone's shoulders.

We encourage you to look for solutions like Spekit that make important sales information accessible in the flow of work, so reps don't have to seek it out in other sources.

STEP 4

Gather insights and refine your processes

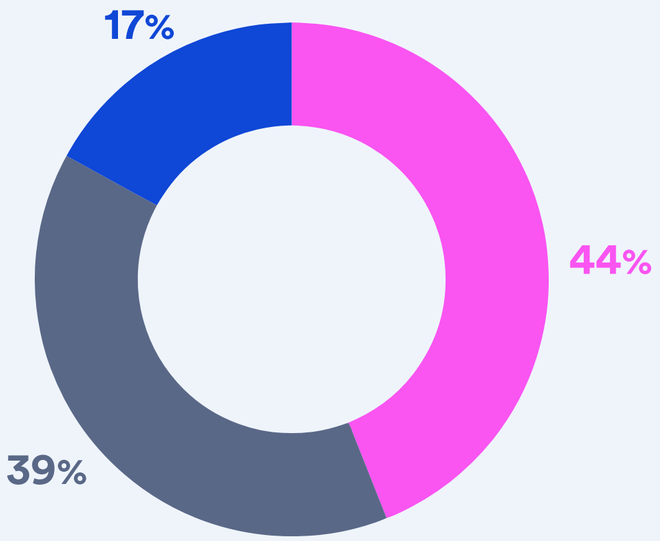
Sales leaders must have in-depth training insights to envoke change.

Most businesses invest an astronomical amount of time and money into building out sales training material for their team. However, too many sales leaders overlook the importance of measuring if the content they create gets used by reps.

The deeper the insights that leaders have, the better Unfortunately, as **Figure 23** shows, fewer than 50% of sales leaders have visibility into what training has been watched and by whom.

Figure 23

Which statement best describes the level of insight that you have into sales rep engagement as it relates to training?



44% | We know what training has been watched and by who

39% | We can find out how many times training has been watched but that's it

17% | We don't obtain any insights into sales rep training engagement

This study found a significant relationship between retention and the insights that leaders have into their rep's sales training engagement.

Sales leaders with high retention rates (>75%) were nearly 30% more likely to retain new reps for more than one year when they had deep insights into sales training than those with low retention rates (<74%).

Sales leaders need to prioritize using this data and collect feedback from reps to improve the overall training experience and retain them. Without a deep understanding of what has been watched and by who, leaders cannot possibly understand if the content is an issue, the delivery mechanism, or the reps themselves.

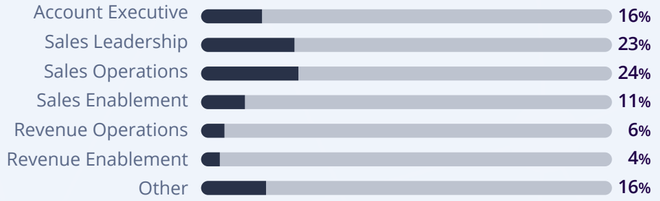
METHODOLOGY

This 2022 State of Sales Onboarding & Training survey was administered online from February 24, 2022 until March 13, 2022. During this period, 1338 responses were collected, and 405 were qualified and complete enough for inclusion in the analysis. Only valid or correlated findings are shared in this report.

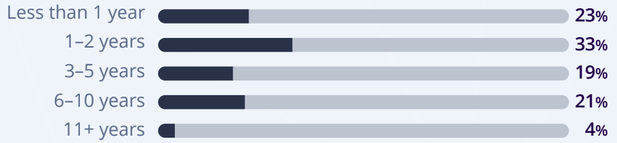
The representativeness of this study's results depends on the similarity of the sample to environments in which this survey data is used for comparison or guidance. Some figures are based on low sample sizes and therefore should be used for informational purposes only.

Summarized is the basic categorization data collected about respondents to enable filtering and analysis of the data:

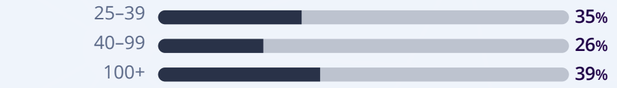
What function best describes your sales role?



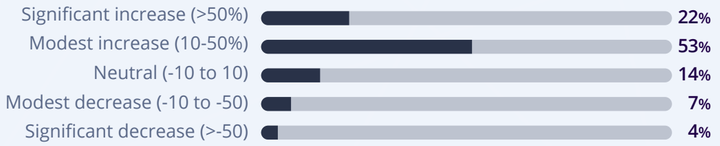
How long have you been in a sales role at your company?



How many people are on the sales team at your company?



Which statement best describes revenue growth at your company in 2021?



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