Seismic

E-BOOK

75 Lessons for Every Sales Training Program

Phase One

- **Sales Overview**
- **Buyer Personas**
- **Tech Stack**
- **Prospecting and Setting Meetings**
- **Learn Together, Win Together**
- **Onboarding Review**
- **First Calls**
- **Certification**

The first phase of onboarding is all about getting new sales reps oriented. They spend two weeks learning about the company, who to sell to, how to sell, and how to structure the first call. At the end of Phase One, reps should feel comfortable finding accounts, emailing prospects, and talking about the company.

Sales Overview

Welcome to the Team

Introduce new reps to their training plan and schedule for the coming weeks. For increased engagement, ask each rep what they hope to learn in the first week.

Sales Meeting Cadence

Sales meetings are unavoidable. It's helpful for reps to receive an explanation of the team's meeting schedule and the purpose of each meeting.

Skills Self-Assessment

Get a baseline for each rep's current skill level. The goal is to identify areas of strengths and weaknesses for improved training.

Practice: Deliver Messaging

Create different sales scenarios, such as cold calling a prospect, and have each rep practice delivering messaging to be used as a baseline for improvement.

Buyer Personas

Buyer Persona Overview

Buyer personas help sales reps better understand their customers. Companies may have more than one persona, so it's important to deliver training on each one.

Practice: Buyer Personas

Once reps have a good understanding of the company's buyer personas, have them put that knowledge to use. Ask each rep to apply buyer info by responding to a sample message from a prospect.

Target Verticals

Buyers most likely fall across a number of verticals. Highlight the company's target verticals, as well as key industry information and pain points.

Tech Stack

Using the Tech Stack

Using Sales tech stacks include software applications that are critical to helping reps close a deal. Break down and provide training on each piece of software in a micro-learning format for easy consumption.

Sales Overview

Prospecting Email Basics
Perseverance is the key to sales success. Highlight three elements of email outreach: connect & catch attention, assume pain points, and offer to help.

Exemplary Touchpoints
Provide reps with examples of messaging that led to sales opportunities. This is a great way to show reps how to effectively communicate with buyers.

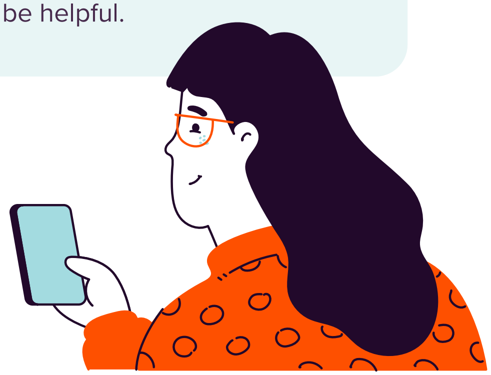
Cold Calling Structure
No two calls are the same. Share important characteristics of a successful cold call including the purpose statement, pitch, and meeting ask.

Cold Calling
Cold calling is intimidating at first. Give reps tips and tricks that will help them confidently pick up the phone.

All About Objections
Objections are inevitable. Debunk a rep's fears around objections and share tactics to handle and eliminate reactions.

Other Options for Success
Email and phone are the most common channels for reps, but they aren't the only options. Provide reps with additional touchpoints and why they may be helpful.

The Anatomy of a Bad Deal
Sometimes the line between a good and bad deal is blurry. Use this training content to clarify common situations reps should avoid.



Learn Together, Win Together

The Sales Methodology

Sales is a team sport. Use this training content to introduce reps to the team's sales philosophy and explain what it means to win together.

Onboarding Review

Onboarding Checkpoint

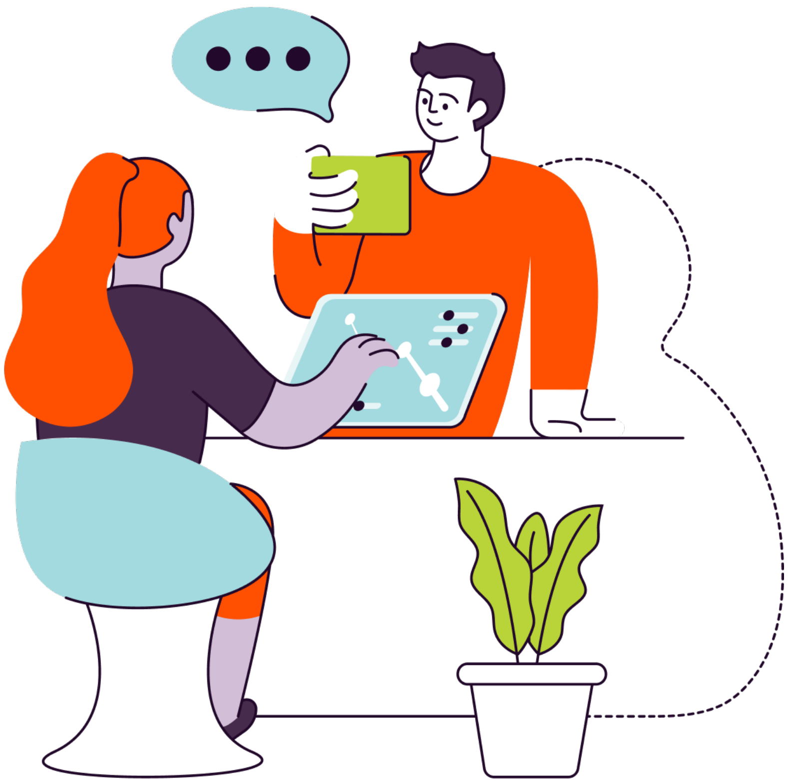
Knowledge checkpoints are important. Use this training time to ask reps about the challenges they're facing and if they feel training has been effective.

Phase Two: Overview & Objectives

Give reps an overview of the next training phase. Include new initiatives, reminders, and other tasks that should be top-of-mind.

Onboarding Reflection

Intentionally set time to check-in with reps throughout the training process. Ask them to highlight a few things they've learned so far.



First Calls

An Intro to Customer-Focused Selling

Customer-focused selling provides core knowledge for effective consultative selling. This is a great time to share the framework and explain how to apply it during first calls.

Social Styles

Prospects vary in personality, communication style, and approaches to decision-making. Teach reps to adapt their sales approach for each style with this training content.

Practice: Recognize & Adapt to Social Styles

Practice makes perfect—and permanent. Give reps a practice opportunity with conversation cues that require them to recognize social styles.

Asking Great Questions

Open-ended sale questions are more likely to get prospects talking. Teach reps how to create powerful, open-ended questions that will get the conversation going.

Practice: Regain Control

Sometimes conversations with prospects go off the rails. Let reps practice their redirection skills to get calls back on track.

First Call Basics

The initial call sets the tone for the entire sales process. Dive into best practices on first calls that maximize the opportunity for a great sales experience.

Preparing for the First Call

The first call is like a job interview. Provide a framework that shows reps what it means to go into a first call adequately prepared.

Seeking Urgency

Urgency gives prospects a reason to move forward. Guide reps to thoroughly understand a prospect's needs, qualify the opportunity, and develop urgency.

Certification

First Email Role Play

A great first call includes focused selling, an understanding of social styles, and effective communication. Ask reps to use these skills in an email conversation.

First Email Wins

Reps need to know what success looks like. After they participate in their own role-play exercise, showcase examples that led to a win in the same situation.

Phase Two

- Demo Overview
- Delivering a Demo
- Certification

By now, reps have set first meetings and are gearing up to have conversations with prospects. In phase two of training, reps will learn and practice the next steps that happen after a discovery conversation, focus on demo skills, and complete a first call practice scenario.

Demo Review

Objectives
Introduce new initiatives for the next phase of training. Remind reps of deadlines and give them a list of goals for this phase of learning.

Moving Forward with Software & Tools
Give reps a deeper dive into the applications they use every day. Build on the knowledge they already have of your tech stack and introduce other helpful platforms.

Great Email Templates
Don't make reps reinvent the wheel. Give them more examples of great prospect emails and a template that they can customize for outreach.

Delivering a Demo

The Art of a Demo
A personalized demo is a great sales tool. Help reps learn the basics of delivering a demo and provide guidance about what makes for a successful conversation.

Using a Demo Account
Give reps access to the tools that enable them to deliver a demo. Explain where and how they can access demo accounts for consistent demonstrations of the product.

Delivering a Better Demo Experience
Does your team use extensions or additional apps that make the demo process even better? Be sure to show how those work in a demo environment as well.

Demo Stories
Show reps what a successful demo looks and sounds like. Highlight the team's best demos that address various prospect needs, use cases, and verticals.

Practice: Delivering a Demo
Now that reps have learned what goes into a great demo, it's their turn. Give reps different scenarios that empower them to test their knowledge and hone their demo skills.

Avoiding Common "Demo Crimes"
Not all demos will go perfectly. Help reps overcome challenges and avoid "crimes" often committed during demos.

Maintaining Momentum
Sales momentum increases as the time between calls shrinks. Provide reps with a definitive list of answers that they need to get from buyers to keep the deal moving forward.

Certification

Delivering a Demo

By now, reps have learned what goes into a successful demo. Give them the chance to role-play and piece together all of the knowledge they've learned with a demo of their own.

Phase Three

- **Deal Overview**
- **The CRM**
- **Pricing & Packaging**
- **Certification**

Reps have officially completed their first month of training and are gaining momentum. While the first two phases focused on generating opportunities and delivering demos, the next phase teaches reps about the deal cycle.

Deal Overview

Objectives

Now that reps are more than halfway through onboarding, give them a fresh update on new training initiatives. This is also a great time to reiterate tasks they should be performing on a day-to-day basis.

The CRM

Managing Business in the CRM
Give reps a deep dive into the company's CRM. There's a lot that goes into understanding a CRM, so remember to break information up so it's easy to understand.

Understanding Opportunity Stages
Getting the opportunity stage right is essential to accurate funnel visibility. Help reps build a robust sales pipeline with a deeper understanding of opportunities.

Managing Activities
From regularly-scheduled calls to ad-hoc emails, there are a lot of touchpoints in one deal. Explain how reps can keep track of their activity in a simple way.

Lost Reasons
Unfortunately, there are lots of ways to lose a deal. Help reps understand common lost reasons at your company and how to edit a deal within the CRM.

Reporting Essentials
A CRM also provides helpful reporting features. Introduce these reports to reps and explain how they can request or access each one.

Managing Tasks
There's a lot that goes into the day-to-day for a sales rep. Give them tips and best practices that help them manage everyday tasks more efficiently.

Qualifying an Opportunity
It's impossible to qualify an opportunity if reps don't know what a great opportunity looks like. Teach them how to properly qualify opportunities based on authority, need, urgency, and budget.

Managing Opportunities
Opportunity management involves updating deal info, tracking opportunities, and recording interactions. Train reps on the best way to manage opportunities so they can close deals faster—and keep the company informed.

Pricing and Packaging

Pricing Basics
Pricing is a critical conversation in the buying process. Provide reps with a high-level overview of pricing strategy for the products or services (platform fees, user tiers, SKUs, etc.)

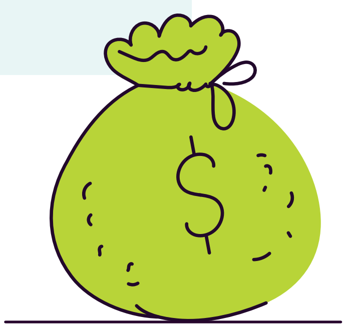
Additional Service Costs
Does your company feature additional services like user onboarding or account management? Provide reps with an overview of these options.

Pricing Details
Once reps understand the pricing basics, it's time to dive into different package features and financial details. It's also helpful to provide reps with guidelines around discounts.

Building a Proposal
Every company's proposal process is different. Break down the process and provide a proposal template for reps to leverage in negotiations.

Creating Contracts
From contract reviews to edits and red lines, contracts are complex. Give reps training on the ins and outs of evaluating contracts and creating addendums.

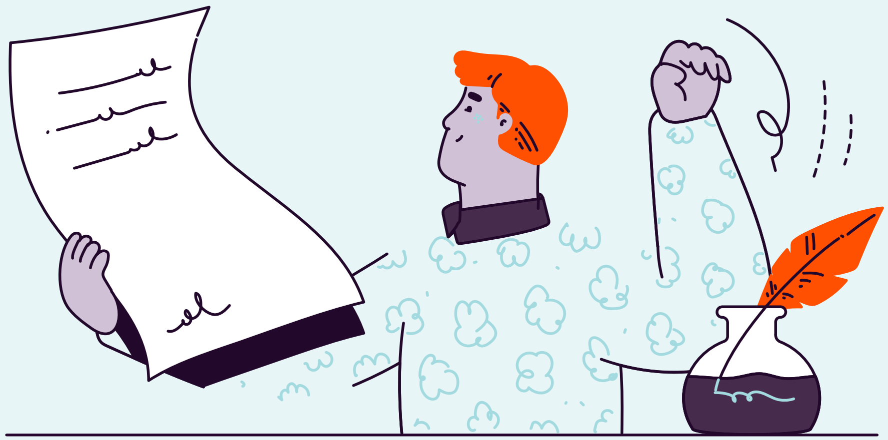
Practice: Positioning Pricing
Pricing conversations can be difficult. Give reps a safe space to practice these discussions so they feel confident going into real negotiations.



Certification

Practice: Proposing a Solution

Proposing a solution, discussing pricing, and signing a contract is an extensive process. Give reps a new role-play scenario that requires them to create an example proposal and discuss it with a prospect.



Phase Four

- **Best Practices**
- **Closing Deals**
- **Certification**

Phase Four focuses on getting reps comfortable with sales best practices, including negotiation and closing a deal. At the conclusion of this phase, reps will complete a practice exercise that includes deal negotiation.

Best Practices

Maximizing LinkedIn

LinkedIn is a powerful sales tool. Teach reps to maximize and leverage their LinkedIn profile to make more connections and close more deals.

Transparent Negotiations

It happens; prospects push back on price, contract length, and payment terms. Help reps tap into the art of negotiation so they can overcome a challenging deal.

Closing Deals

Close the Deal

Still waiting for a buyer to sign the dotted line? Give reps tips and tricks to help them move buyers over the edge and sign the contract.

Closing Process & Handoff

The deal closed—congrats! Now, show reps what needs to happen after the contract is signed, such as updating the CRM or facilitating a handoff.

Certification

Practice: Path to Launch

This practice scenario requires reps to piece together every aspect of deal progression. The goal of this roleplay is to help reps practice closing an opportunity.

Phase Five

- **Partnerships & Integrations**
- **The Competition**
- **Use Cases**
- **Trials**
- **Territories**

Congratulations: the new reps made it to the final phase of sales onboarding and training! Now it's time to focus on fully ramping reps to deepen their sales skills, close more deals, and do better work.

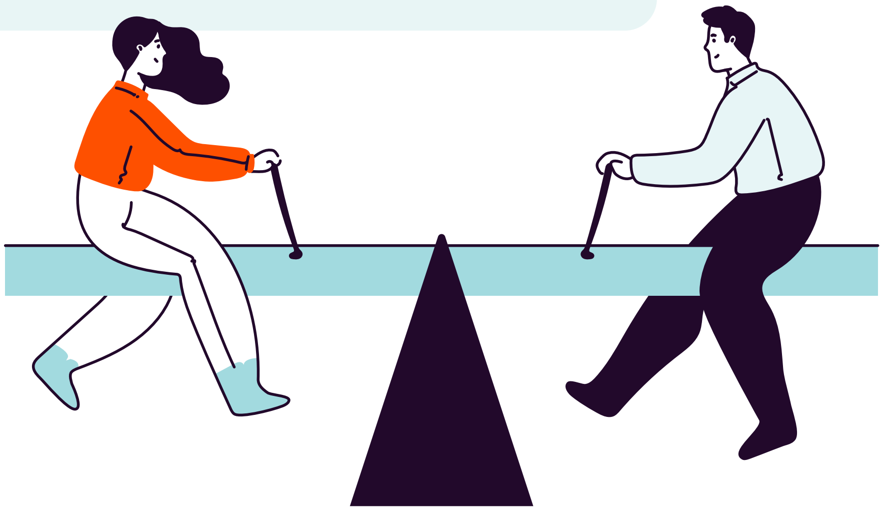
Partnerships and Integrations

Partnerships Overview
Partnerships with other companies are invaluable to your sales team—and to your entire company. Be sure to share your organization's partnership strategy and explain how it helps drive sales leads.

Active Partners
Once reps understand the importance of partnerships, it's time to take the next step. Highlight active partnerships and explain what reps should do if they come across a prospective partner.

Integrations
Many companies work with others to offer product integrations. Use this time to train reps about existing product integrations.

Integration Demos
Demos that include integrations are a bit more complex than a normal demo. Provide reps with adequate training on each integration and how to properly show it in a demo.



The Competition

Competition Overview

To beat the competition, reps need to fully understand who they're up against. Provide reps with a competitor analysis on your company's biggest competitors.

Competitive Information: "The Rest"

It's likely your company is up against a number of competitors. Include training on other competitors that come up in deals or are "up in coming" in the market.

Battle Cards

Battle cards are one-page documents that reps can use for quick reference. Use this training content to highlight what the competition offers, their strengths and weaknesses, and how to beat them in a deal.

Practice: Objection Handling

What happens if a prospect mentions a competitor during a deal? Give reps an opportunity to practice responding to common objections in competitive deals.

Use Cases

Customer Stories
Customer stories are the lifeblood of a good sales process. Provide reps with different case studies that will help them learn from and share with customers.

Intro to Win/Loss Reviews
The best sales teams learn from their mistakes and celebrate wins. Use this part of training to highlight learnings from both closed lost and closed won opportunities.

Practice: Telling the Best Customer Stories
Help reps become master storytellers. Give them the opportunity to practice sharing the company's best customer stories before a real prospect call.

Trials

Managing Prospect Trials

A product trial can make or break a deal. Give reps guidelines around trial management including what they should do before, during, and after the trial time.

Territories

Territory Development Overview

Territory development is a key part of any sales strategy. This training content provides an overview of territory management, suggestions for how reps can get started, and resources to help them hit their goals.

Field Trips

Face-to-face meetings foster relationships and move the sales process forward. Help sales reps understand the importance of field trips and meeting prospects in-person.

Appendix: 5 ways to Elevate Onboarding with Sales Training Software

Provide Diversity: World-class sales training programs feature a healthy mix of in-person coaching, on-demand training, and peer/mentor shadowing. This combination provides reps with a holistic learning experience where they're equipped and enabled in a variety of different ways. Training diversification also helps managers get a clear picture of what's working well, what isn't working, and what's missing.

Offer Flexibility: Every rep learns differently—and at varying speeds. Training software gives reps the ability to access learning content when and where they need it and at their own pace, regardless of their learning preferences. The ability to deliver the right training at the right time also improves knowledge retention and engagement.

Practice Skills: Sales reps cannot get to spectacular performance without practice. Consistent practice is an effective way to break up onboarding and reinforce skills while reps are still processing new information. With sales training software, reps can practice making a cold call or delivering a demo in a safe space to hone their skills.

Deliver Feedback: Feedback is a two-way street in sales onboarding. Training software empowers reps to provide feedback on the training material they just reviewed, ask questions, and more. It also allows managers to review reps' training progress and practice sessions, and deliver targeted feedback during one-on-one meetings instead of focusing on general info transfer.

Measure Success: It's difficult to keep track of a rep's onboarding progress, especially when there's a large number of reps in different stages of their onboarding journey. Instead of tracking progress in unorganized spreadsheets, training software makes it easy to view training completion, comprehension, and engagement. This makes the path to sales productivity clearer for everyone—from new teammates all the way up to sales leadership.

Seismic

About Seismic

Seismic is the global leader in enablement, helping organizations engage customers, enable teams, and ignite revenue growth. The Seismic Enablement Cloud™ is the most powerful, unified enablement platform that equips customer-facing teams with the right skills, content, tools, and insights to grow and win. From the world's largest enterprises to startups and small businesses, more than 2,000 organizations around the globe trust Seismic for their enablement needs. Seismic is headquartered in San Diego with offices across North America, Europe, and Australia.

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