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The Ultimate SDR Onboarding Guide

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Contents

A guide or playbook to provide clear guidance and actions for the successful onboarding of SDRs. team. Around 1300 words max, rough section word counts included. Each of these sections could also be separate blog posts and/or downloads for setting these, potential templates, etc.

Introduction

Onboarding an SDR or new sales team member is a process that can easily be seen as a box-ticking exercise. But if you want to give your new team member the best chance to hit the ground running, it's essential to have a process in place for mutual success.

Get that process right, and you'll be able to save time and improve your team's efficiency and build an integrated and high-functioning team where everyone understands their role and the expectations you have for them. Think of onboarding as an investment in the future. As you define and standardize your SDR onboarding plan, ramp-up time will be quicker, and your company will maximize speed and scale.

The vital takeaway is that onboarding should lead to an active process of coaching and personal development–ensuring that your team is ready to face the challenges at every stage. At Jiminny, we don't see onboarding as a one-day or one-week occasion but as something to build on over time.

This onboarding guide explores the process from top to tail, following the plan in place by our very own Shelley Lavery, Chief Commercial Officer at Jiminny. We want this guide to give you an outline that you can follow and helpful information that you can shape according to your business' offerings.

> Any coaching is better than no coaching – quality is better than quantity. You’re also not the only coach on the team; give your team time to coach and reflect on their own performance and plan improvements. That autonomy can be very powerful.

Pre-Onboarding Plan

It's cliche time, but failure to plan is planning to fail. So often, people think of onboarding as the process that starts on Day 1 of your new hire. But as with most things, the earlier you start, the better you can grow.

Remember your first day at a new job? Even the most experienced of us can have nerves–and the unknown can often exacerbate that. So before your hire starts, send them helpful information, so they know what to expect the minute they log on.

Share any helpful reading before your new hire starts

Our intro bundle for onboarding SDRs is a mix-and-match of making new hires feel welcome and giving them some insight into the role and what we want from them. It starts with a personalized video from Shelley, which helps everyone get used to a person they'll be spending time with a lot in their first couple of weeks.

What's in the video?

- A rundown of the team and an overview of their welcome lunch is a great way to help someone feel like they're part of a welcoming and dynamic team.
- A run-through of what to expect on their first day and first week so they're not blindsided by a week of meetings
- Finally, a quick run-through on how to access their emails and calendar and a brief overview of the meetings (and their purpose) for the first week.

Obviously, at Jiminny, we make use of our tool (#practicewhatyoupreach). So we provide our new hires with an insight seat, where they can access best practice calls and playlists. These playlists are built around the customer and prospect cycle, so the new start gets a feel for the role and can come in understanding what best practice looks like.

Finally, we share any helpful reading or information that can help them get their heads around who their sales targets are going to be. This might be influencer profiles or critical reading. Remember: you don't want to overwhelm your new hire at the start, but we find it's invaluable to provide clear guidelines before someone starts–and it helps with any first-day-at-school nerves.

1-Day Plan:
Onboarding & HR

Congratulations, your new hire is officially a team member! Now it's time to get technical. The first day should be dedicated to preparing your new hire to do their job correctly. We're talking about tech setup and HR information.

Schedule a few hours for a soft onboarding session to cover everything from servers to tools. First, of course, you want to ensure that all the login information is ready and running for your team member so that they can access their tech stack when you dive into the meat of the onboarding.

Day 1 should absolutely include a 121 with whoever their manager is going to be.
This means they have a friendly face and point of contact so that you can communicate an overview of the company and how your team fits into the general hierarchy. Guide your new start through the cultural cores and values of the company, and allow them to connect with the broader company mission. Then if you offer tools like ongoing coaching or mentorship, it's a good time to let them know what they can take advantage of and how they can develop within their role.

Finally, the afternoon of the first day is an opportunity to provide some persona-based training information so that they can start to understand not just how their role fits within the company but how the buyer personas fit within the sales department.

> **Let them know what they can take advantage of and how they can develop within their role**

7-Day Plan: Getting Started

The first week of onboarding is about allowing your new hire to get to grips with two key areas. First, of course, it's essential to do an overview of the company and its objectives, so your sales hire knows what they're, well, selling. And then, they need to get to grips with how the sales team fits into the bigger picture and interact with any other departments and SDRs in the team.

Getting To Know The Company

We all know that sales reps who can focus on challenges and customer pain points are more likely to convert – so why not teach that from the jump?

You want your new hire to become truly comfortable with your services and offering. The aim is to make sure people understand your value, which means talking to the teams responsible for that and their processes. Rather than turning people into parrots, who just know how to repeat a script, you want to encourage them to start joining the dots between your USP and the customer's pain points.

This is when it's also integral to meet with their colleagues, both in the sales team and the other departments they'll invariably work with–account executives and BDRs will help to provide valuable context so that sales don't feel siloed but part of the bigger picture.

Getting To Know Personas

Alongside getting to grips with what your product or service can do, it's vital to focus on personas–again drawing the lines between specific pain points your personas have and how you provide the solution. A key focus for us at Jiminny (and a golden rule for sales in general) is to remember that effective salespeople don't sell features but should solve a problem instead.

At this stage of the process, a buyer persona document or outline is your best friend. This document can be part of your team sales bible and is a simple and easy way to get people on board with how you do things.

Get Roleplaying

In their first days, you want your sales hires to start reaping the benefits of daily roleplays–not just to give them something to do but because it's integral to get them on the phones as quickly as possible. We recommend aiming to get your reps on calls by the end of Day 3 because, ultimately, sales reps learn better by doing rather than just trying to get their heads around the theoretical.

Role-play exercises also create a team environment where people can learn from each other, become familiar with the expectations and challenges of the role, and help with any of the challenges they will undoubtedly face.

Set Expectations

Week 1 is about setting expectations–not just for the first days, but so they can start to see how their role will develop and what you expect of them when they do. Clear communication and clarity here allow your team member to engage openly and highlight the expectations of the role. Your new hire wants to be confident that they know how they can deliver what you need–and surpass your expectations. By day three, you want to be looking at creating a comp plan, targets, and the all-important 30-60-90-day plan.

Every organization is different, BUT you should aim to set a minimum standard for the SDR based on their experience level, so they're accountable for their aims/targets. Don't be afraid to get granular; set targets that allow your rep to ramp up. For example, performance in the first month should be 30% of their targets; in Month 2, you're aiming for 60%, and by Month 3, you want a sales rep who can operate at 100%.

> **Don't be afraid to get granular; set targets that allow your rep to ramp up.**

You also want to clarify what their accounts should look like and create a plan of action for you and them, to understand when they're performing well–and be clear on any issues or if they're falling behind.

Time Management

Part of the expectation setting is also about ensuring that your sales rep can confidently manage their time–and you need to be able to see how they work.

At Jiminny, in the first week, we get our new hires to start the process of time blocking and sharing their calendars with us for review. So in the first week, you want to have plenty of 121 time to clearly understand what they'll be doing, how they'll be doing it, and provide actionable feedback for them to grow and improve.

We also operate separate times for self-assessment and manager assessment, which creates a healthy habit that should be ongoing as they grow into the role.

Tips & Tricks for Week 1

- Keep it personal: the first week, you want to ensure your new team member is in-person in the office with the rest of your team. This means they can pick up what's happening around them and have the opportunity for necessary face time with you as their manager so you can learn what they enjoy, where they excel, and where they may need additional support or training.
- Learning the fundamentals: ensure that your SDR sets time aside to onboard themselves and understand what best practice looks like. Share outreach and engagement tools; encourage them to spend a couple of hours daily listening to calls and playlists.
- Scripting essentials: by the end of the first week, there are fundamentals you should want your SDR to know and that they should have delivered and reviewed by their manager. These include:
- How to write a great email
- How to research a prospect on LinkedIn or research an account
- Ensuring that their personal LinkedIn is set up properly
- Scripts and emails should be written and shared with the team so that they can get helpful feedback and the opportunity to nail the fundamentals.

> Challenge your new starter to make 10 really bad calls – that they can do. It's much better than putting pressure on them to make 10 good ones. The good ones will come with time and practice.

30-Day Plan:
Time For Action

Once your new hire is au fait with personas and has their scripts approved, it's time to put this into practice. First, they need to understand where the challenges with your personas lie and how they are incorporated into the sales framework – putting the plans of Week 1 into action.

Shelley highlights that the longer you wait for a BDR to get on the phone, the easier it is for them to build up a core reluctance, making it harder for them to perform. So instead, get your BDRs used to being in the environment, and get them working on their actual role. Mixing theory with practice is also vital to ensure that your new hire isn't a passive voyager on the sales journey but can instead think about how they deliver in their own way.

Practice Makes Perfect

Set tasks where they can begin to apply what they've learned, and Shelley is a huge proponent that practice makes perfect. At Jiminny, we'll give examples of sales leaders and ask SDRs to pick out various triggers on prospects based on our sales framework. The next task is to write emails based on the framework so that Shelley can review and provide feedback and guidance on their delivery.

Another way to ensure your team is on the same page is to encourage sharing best practice calls. This should already be an integral part of your coaching frameworks, as they allow your team to establish the focus areas that help them to excel–and builds a healthy culture of teamwork and mutual respect.

> **Set tasks where they can begin to apply what they've learned and encourage sharing best practice calls**

Keep Reviewing

In the first weeks, it's important to set up a constant feedback loop so that your SDR can keep strengthening those great habits and you can nip any problems in the bud. So we set up a couple of sessions a day, which can cover and explore a range of areas.

We explore everything from how the SDR currently prospects an account, from calls to videos, as well as email outreach. These should all incorporate how the prospecting fits into the pain funnel and show an understanding of why people buy.

Every day as a manager, you should listen to new calls and set your KPIs for listening to everything. But that's not just a role for the manager–your team should be listening in on calls, and your new hire should be live listening to more experienced BDR calls. So set this up as a team practice where people can engage with each other, review calls, and promote great calls to a playlist.

Tools To Help

As you've seen, the Jiminny playlist feature allows you to build a playlist of calls that run the gamut from 'what-not-to-do' to 'best-in-class examples'–from pre-onboarding through to established salespeople. It's a fundamental way to showcase how your particular team runs discovery calls, letting your new sales reps understand their roles in practice.

> **It's crucial to establish an open feedback cycle**

Our conversation intelligence platform also allows you to scan calls for specific words, sentiment analysis, and repeated questions and conversations. This is a great way to understand if your new hire is asking the right questions, giving the potential lead time to talk, and allowing you to incorporate on-the-spot coaching where needed.

Finally, the "Coach Me" feature allows SDRs to request support and help, so Shelley can step in and provide help and advice when unexpected or tricky situations arise.

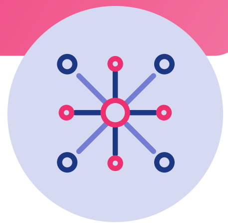
At the end of the 30 Day period

However you develop your team, it's crucial to establish an open feedback cycle where all your team members can enjoy a refresher and allow themselves to extend their skills.

As your SDR develops their comfort and proficiency in tools and systems, they should be more fluent in understanding how the company works. They should also understand the range of prospecting avenues, from video and calls to social and emails.

This allows you to break things into the fundamentals and explore the more advanced techniques they can grow into, such as cold calling, tonality, objection handling, and understanding the difference between warm and cold leads.

At Jiminny, we also make sure our new hires have sat down with our CEO to get a broader feel for what they're selling – so they can align with the pain points of their personas.



60-90 Day Plan:
Getting Up To Speed

It's important enough that we'll say it again: Onboarding isn't just about the first two-three weeks; it should be built up over time and morph into the development and future career-building of your sales reps.

By building your onboarding process as part of the sales rep development process, you'll be able to make sure that your team continues to grow and develop.

Continuous Improvement

Now you're moving from onboarding into a culture of continuous coaching. First, review their targets and KPIs to ensure your new(ish) hire consistently hits their activity metrics. How close have they gotten to hitting the target? How well are they performing in their conversations on the phone? Keeping track of these is vital to ensure your team is delivering on their promise.

How you measure this is likely a combination of onboarding quizzes, spot-check quizzes, and coaching reviews. We like to use a form based on Ralph Barsi's self-assessment process, which allows our sales team to understand and be aware of their performance and where they might need added support.

This process also allows you to score and track every month to ensure that the process works for them and that they reach their potential.

At the end of 90 Days

By the end of their 90 days, your sales rep should be learning more advanced prospecting and sales nav searches. The process will evolve from learning to continual improvement and coaching.

Core reviews run into one a week, building in a standardized process of checking cold calls and peer-review. As an SDR manager, you should spot-check their calls, emails, and LinkedIn outreach, calling out the good wins and then constructively building on their performance.

> **Developing a team is all about consistency, communication and coaching**

With a thorough onboarding process, you're not only setting your new hire up for a successful career but also motivating and inspiring them to see how they can grow and develop with your business. There's no secret to getting it right beyond the practices you already know for having a high-performing and developing team: consistency, communication, and coaching.

Ultimate Onboarding Checklist

Before the Onboarding

- [ ] Prep-reading
- [ ] Set up the tech stack for insight and viewing
- [ ] Arrange best practice calls
- [ ] Create a welcome video

7-Day Checklist

- [ ] Tech stack onboarding & HR set-up
- [ ] Establish a 30-60-90 Plan with KPIs
- [ ] Set up check-ins and wrap-ups with you/ their manager
- [ ] Cultivate an environment of best practices and ongoing learning
- [ ] Understand personas and pain points

30-60-90 Checklist

- [ ] Establish self-assessment checklist practice
- [ ] Keep a shared track of performance, targets, and consistent measurement
- [ ] Ensure there is an ongoing coaching and development process in place

"Conversations will feel 'difficult' until you have them daily, so have them daily. Your team deserves for you to be honest with them. Remember that feedback includes the bad stuff as well as the good stuff, and it's extremely powerful when it goes both ways."

About Jiminny

Jiminny provides real-time visibility and insights into customer conversations so that revenue teams have the data they need to start having quality conversations with customers, win more deals and ultimately grow revenue.

Jiminny records, transcribes and analyzes voice and video calls, connecting reps, managers and other teams across the business with the voice of your customers. By allowing teams to listen, comment and coach themselves and each other, Jiminny bridges the gap between a conversation intelligence platform and creating a culture of continual growth and development. Teams using Jiminny see 3x quicker ramp times, 15% higher win rates and 100% ROI in 6 months or less.

Jiminny was recently named the #1 conversation intelligence tool on G2 for their Summer 2022, Autumn 2022 and Winter 2023 report. To learn more about how Jiminny helps you ramp reps 3x faster, book a demo or trial Jiminny for free here.

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