Browne-learn.com Presents

Sales Onboarding Curriculum

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Introduction

The ***Sales Onboarding Curriculum*** plan/high level design presents the instructional content as well as aligned activities and assessments. The curriculum plan was designed in a manner that allows for the presentation, practice, assessment, and support of content in the most logical order and manner for Instructor-led training and distance education via Metro learning experiences (e.g. eLearning). To illustrate the eLearning instructional design process to be implemented, the plan/design table includes a 1-2-3-4 instructional motif which essentially presents the logical progression of learning and support, as follows:

1. Presentation of the content in an accurate, concise, and logical manner such that it is visually pleasing and engaging to the learner.
2. Practice activities that reinforce the content taught and Extension activities that ensure enduring understanding and application in the context of the job, or on-the-job.
3. Assessment of learning outcomes via objective-based or performance-based targeted assessment methods and tools (e.g. tests, quizzes, rubrics, etc.)
4. Documentation and/or performance support tools that provide appropriate on-the-job and in-the-moment support.

Audience

The instructional content, activities, assessments/evaluations, and support in the curriculum represent the most valuable and relevant topics to *new* ***sales personnel*** within the division.

Variables and Assumptions

General

- Hiring is on-going; it does not simply occur at regular intervals or at a specific time (i.e. week of the month, month within a quarter, etc.)
- Local sites in the division have customized, site-specific training that is conducted for sales personnel
- Some sites may not have any formal sales onboarding/training due to the fact that they have a support role and do not directly hire sales personnel
- Current onboarding (at local sites) for sales roles typically takes 4-6 weeks.

Value Selling

- Value Selling eLearning courses are prerequisites for attending the *in-country* VSA workshop. However, these is no formal due date(s) or other completion requirements.
- *In-country* VSA workshops are conducted once per quarter (if approved), specifically the first month of each quarter. However, currently there is no official schedule of these workshops.

Requirements

- New sales representatives are expected to complete all required training within the first 90 days
- New sales representatives, just as all employees, are required to complete compliance training within the first 30 days

Field Work (Experiences)

- Typically begin after the first 4-6 weeks or at the beginning of the 2nd month — subject to site-specific guidelines/requirements
- Time spent in the field typically begins with once per week (during the 2nd month) then, during the 3rd month or last 30 days of the onboarding process, becomes less frequent yet longer in duration — subject to site-specific guidelines/requirements
- Actual experiences and work in the field, and with whom, is determined by his/her sales manager. Therefore, field experiences are **not** included in the sales onboarding curriculum

Separate curricula or training required in addition to sales onboarding curriculum

- HR onboarding for specific regions and/or local sites
- General onboarding curriculum for new hires (to be launched globally in English)
- Quality system training (e.g. ISO 13485, GDP, etc.)
- Compliance training (e.g. Code of conduct, etc.)

Comments and Recommendations

- Currently, there is no knowledge of a week by week breakdown of when training should be conducted with new employees or required completion dates, only timeframes.

    - ★ Recommendation:

      When curricula is implemented, it is recommended that more concrete due dates be established for new employees.

- Currently, Value Selling conceptual training (i.e. VSA eLearning courses) is available to new sales representatives within an acceptable amount of time from the start date. That enables the sales representatives to complete that coursework and utilize it, if she/she desires. However, the timing of the Value Selling workshop(s) are not known to be aligned in time with the needs of the sales representative, which prevents valuable and timely embedment of the VS framework/model. This is because the VSA workshop(s) being conducted are only once per quarter, at the beginning of the first month of each quarter. Hypothetically, a sales representative could go almost 90 days without the VSA workshop, which is not ideal and, in some cases, can lead to leaning on his/her own sales framework/model in the interim.

    - ★ Recommendation:

      Start dates of sales representatives should closely align with the timing of the VSA workshop(s).
      E.g. VSA workshop should be within the first 4-6 weeks of the start date.
      Or if that is not possible, it would be advantageous to provide more structure surrounding the VSA eLearning coursework (e.g. when, how we should reinforce and embed/extend while awaiting the VSA workshop

- Currently, regional/local/site-specific onboarding is not completely aligned with the global organization or its requirements, other than quality and/or compliance training. This is clearly not an EME issue alone, it also effects Asia Pacific and North America.

    - ★ Recommendation:

      Adoption and implementation of general onboarding and sales onboarding across the organization with customizations being considered/allowed; however, with no exceptions to adoption being allowed. This adoption and implementation requirement allows for a consistent onboarding experience for all sales representatives regardless of location/entity.

Sales Onboarding Curriculum — *Detailed*

1 → 2 → 3 → 4

Module	Content	Reinforcement & Extension (EXT) Activities *Relevant Experiential learning activities and extensions*	Evaluations & Assessments (KSAs) Level 1: Reaction (Attitude) Level 2: Learning (Knowledge, Skills) Levels 3 (Behavior) & 4 (Results)*	Support
HR and site-specific Orientation and Training	• Introduction to colleagues • Onboarding process (Overview) • Onboarding completion requirements • Entity/site-specific policies, procedures, and required training	Any required forms and checklists should be completed. Any site-specific ILT that is necessary to maintain governmental compliance for Medical Device Operations/Manufacturing should be conducted/completed. *Examples include: ISO, FDA, Good documentation practices, etc.*		
IT Setup	• PC, docking stations, monitors, iPads, etc. • Systems access, as appropriate to job role	Any required forms and checklists should be completed. Also, if any PC productivity software training is required		
Global Onboarding, Quality, and Compliance Curricula	• Getting started / Welcome Aboard • Intranet Systems (for all employees) • Organizational policies & procedures • Employee Referral Program • ON TRACC (intros, courses, tools) • Performance TRACC • Rewards/recognition programs • Knowing Now Matters (eBook) • Quality training (metro courses) • Compliance Training (metro courses)	The Global onboarding, Quality and Compliance curricula are separate from the Sales Onboarding Curriculum. Therefore, these are not addressed here.		

<table>
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<tr><td>iPad Fundamentals</td><td>• Interactive iPad video/ebook that covers the following concepts:
o iPad anatomy
o iOS basics (updates, Apple IDs, etc.)
o Downloading apps from the app store
o Using the touch screen: tapping, swiping, etc.
o Opening and closing apps
o Creating and deleting folders
o Being productive on the iPad
o Taking and accessing photos
o Others TBD</td><td>• Download and explore the following apps from the app store (except Folio A+):
o Folio A+ app from Productivity (Intranet)
o Microsoft office
o Microsoft outlook
o Skype for business
o SlideShark
o Dropbox
o iTranslate
o Dragon dictation
• Take a picture of the screen on which all of the apps are seen and post to Sales Connect on Metro.</td><td>• Level 2 (K): objective-based assessment of iPad anatomy, etc.</td><td>• iPad Basics User Guide (support pdf)</td></tr>
<tr><td>Sales Systems Overview</td><td>• Intranet Sales Toolkit
a. What's in the Toolkit?
b. How is the Toolkit organized?
c. Using materials: internal or external?
• CRM Overview
a. What is a CRM and why is it important?
b. Organizational CRM: Microsoft Dynamics
• PLM Overview
a. What is a PLM and why is it important?
b. Organization's PLM: Ensur or Agile</td><td>• Intranet Sales Toolkit Discovery Activity – aka scavenger hunt (Metro)
• Access and explore MS Dynamics
• Request access to Ensur/Agile and schedule training
• EXT: Practice Ensur/Agile routing in the sandbox/test system and include the Sales Manager or Senior Sales Reps in the routing</td><td>• Level 1: Checklist (Metro checklist sign off)
-and-
• Level 2 (KS): CRM/PLM Overview assessment (quiz/test). Two options
a. (K) Objective/text-based
b. (S) Performance/skill-based (*Preferred):
▪ virtual/web-based or
▪ physical</td><td>• Intranet Sales Toolkit</td></tr>
</table>

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Sales: Roles and Responsibilities	• Sales Roles and Responsibilities — Possible topics include: a. Sales organizational structure b. General expectations (weekly, monthly, quarterly, etc.) c. Prospecting d. Sales calls/presentations e. Funnel management f. Success measurements • Sales partnerships and support roles & responsibilities: a. Marketing b. Customer Service c. Technical Services d. Finance e. Supply Chain	• Roles, responsibilities, and support functions activity (TBD) • EXT: SR roles and responsibilities discussion with Sales Manager. (*This can occur during or after the introduction to the SM or assigned Senior SR sponsor/field coach*	• Level 2 (K): Sales org and responsibilities assessment (test)	• Roles, Responsibilities, and Org Charts Support doc (TBD by local and/or regional sites)
Customer and Technical Services	• Customer Services process Sub-topics • Technical services process Sub-topics • Complaint handling process Sub-topics	• Customer Service observation, if in-house (or watch video of Customer Services TBD). *SR will spend at least 1 hour observing various activities in customer services (e.g. taking calls, handling issues, etc.). Then, he/she will report on his/her observation in Sales Connect in Metro* . • Technical Services observation, if available in-house. *Same activity as described above for customer services*	• Level 2 (KS): Objective-based assessment which measures knowledge of processes and some level of skill (completing forms, etc.)	• Customer Services process Performance Support document (TBD) • Technical Services process Performance Support document (TBD) • Complaint Handling process Performance Support document (TBD)

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Products	• Current, or soon to launch (STL) eLearning courses, as needed* • Local ILT product training by qualified SMEs/trainers	• Product training Q & A (Follow up to training — two options: attend a scheduled F2F/Virtual session or post a question to a moderated Metro Sales Connect discussion topic. In either case, the trainer/ moderator should be an SME or qualified sales/marketing professional) • Hands-on use of the actual products, when possible	• Level 2 (K): Metro eL course, INFORMAL Knowledge Checks and FORMAL objective-based assessments -or- • Level 2 (K): Local ILT product training objective-based assessments, *one for each product.** -and- • Level 2 (S): Demonstrating how to use the products for the SR's target market. (eval. rubrics TBD)	• Our Product demos/videos • Intranet Sales Toolkit: o Product Sell Sheets o Product Folios o Training Certificates and Quizzes for customer training
Product Positioning Strategy (Solutions-based): *Radius*	• What is Radius? *"Customer-focused, solutions-driven, and outcomes-dependent strategy for positioning the value of our products in today's POC diagnostic climate." (FAB 2016)* • Why is the Radius approach right for the organization? • How will using the Radius approach help me? (WIIFM) • Radius mini-modules: o RT/Critical Care o Emergency Dept. o Emergency Dept. product o Infectious Disease Dept.	• Use of current Radius training activities • Others TBD	• Level 1 (A): Survey to assess reaction and attitudes after Radius training workshop(s) -and- • Level 2 (K): Radius Overview objective-based assessment (10 question test) -and- • Level 2 (K): Radius mini-modules objective-based assessments (5 question quizzes) *Level 3 (B) Evaluation should be considered after 6 months to verify the Radius strategies are properly embedded.	• Intranet INTERNAL Sales tools/materials: o Value Prompters o Value Questions o Key Influencers o Radius Educational Series Summaries o Elevator pitches • Intranet *FIELD* Sales tools/materials: o Radius dept. Folios o Product Folios o Product mini-decks o Leave-behinds o Scientific affairs slides

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	o Infectious Disease: *Test Target Treat* o C Suite o POCC			o Educational opportunities • Intranet Folio User Guide
Sales Process	• Targeting and Planning o Market & profitability analyses, etc. • Territory management • Prospecting • Qualifying and converting leads (lead conversion) • Sales funnel management (includes CRM entries) • Sales presentations • Proposals • Contracts/closing • Commissions/Incentives	• Ask a colleague Sales Connect (Metro) discussion – "Tips from the Field" re: any/all of the sales process • EXT: Q & A with Sales Manager	• Level 2 (K): Sales process objective-based assessment (test) that covers the various topic Los	• Sales Process (flow chart/diagram, TBD) • Sales Process Performance Support documents (TBD)
Sales Funnel Management and MS Dynamics (CRM)	• Funnel Management: o Characteristics of a healthy sales funnel within the organization o Using/applying the CRM o Others TBD • MSD training (1 day workshop)	• The organization's healthy sales funnel activity (via Metro) *Matching/drag and drop activity whereby circular "molecules" with either healthy characteristics or unhealthy characteristics are placed into the sales funnel.* • MSD reinforcement activities TBD	• Level 1: Survey after MSD training workshop -and- • Level 2 (K): MSD objective-based assessment (test) -and- • Level 2 (S): MSD performance-based skill assessment *The level 2 assessment can be a combined assessment with two parts: (1) knowledge and (2) Skills, if preferred.*	• MSD performance support documents (TBD)

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<tr><td>Sales Skills</td><td>Sales Process Skills:
• Managing territories
  o Mapping your route using Batch Geo or other technology
• Effective Prospecting and/or cold calling
• Conducting discovery calls (“Getting the Appointment/ Presentation”)
• Positioning Products/solutions: Positioning the organization above the competition
• Conducting effective sales presentations and proposals — strategies & best practices
• Closing the deal (“Getting the Win!”)

Handling objections/obstacles:
• Common objections
• Strategies for overcoming the objectives/obstacles

Other:
• Time management (TBD)

****
The following would be a GREAT addition. However, for the sake of simplicity, activities, etc. are not addressed in the curriculum.
***************************</td><td>Sales process:
• Cold Call Audio Analysis
Recorded audio role-plays between an SR and qualified leads. SR will review/listen to the scenarios and then use a checklist to determine whether recommended cold call techniques were used.
• Discovery Practice Activity
An activity (TBD) that explores best practices for discovery
• Proposals/Closing Scenarios Activity
Written or recorded video or audio role-play scenarios (TBD) that present examples of good and bad proposals and/or closing presentations. The SR would select good or bad after reviewing/ listening.

Handling objections/obstacles:
• “Objections from the field” obtained through Sales Connect in Metro or other form of communication.
SR obtains both common and unexpected objections experienced by SRs in the field.
• Overcoming objections/obstacles activity:
Written or recorded video or audio role-play scenarios (TBD) that include common objections experienced in sales presentations/ proposals. The SR will choose the</td><td>Two separate Level 2 (K) objective and scenario-based quizzes/tests, as follows:
• Sales Prep: prospecting, cold calling, and discovery calls
• Sales Event: conducting presentations, positioning products, handling/ overcoming objections, and closing the deal (?)

*Level 3 (B) Evaluation should be considered after 6 months to verify the Sales Process skills are embedded.

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*If Personalities training is conducted …
• Level 2 (KS): Objective and scenario-based assessment quiz on personality categories and how to communicate/deal with the appropriately</td><td>• Best practices for overcoming objections quick tips document (TBD)
• *If training is available* Personalities quick reference guide (TBD)</td></tr>
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	Dealing with Personalities • Recognizing specific personalities • Communicating and maneuvering appropriately for the personality	*best response to overcome the objection.* **The scenarios should be aligned to Radius so that the objections are applicable to specific key influencers/decision-makers and operating environments.* *E.g. objections for POCs vs. objections for ED, etc.* • EXT: Conduct a role-play "overcoming objections" practice presentation with SM, senior SR, or peer. (TBD) *The SM (or other individual) should play the customer. The SR should attempt to overcome the objections made by the customer.* **Comprehensive Extension:** • Conduct a practice discovery meeting/call and sales presentation or proposal with the sales manager, senior SR, or peer (as appropriate).		
	Digital Selling (with iPad) • Using iPad effectively during sales presentations • Using Folio A+ app to showcase product features and benefits effectively • Capturing follow-up or other information efficiently • Sales contracts/closing?	• Download (if not pre-loaded) and explore MS Dynamic app • Enter a lead, opportunity, or account using iPad Prepare for and give a sales pitch/presentation using the Folio A+ app	• Level 2 (S): iPad skill assessment o Administered by sales manager or senior sales rep) o Assesses iPad fundamentals and iPad selling -or-	• *Intranet Sales Toolkit Folio A+ app*

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			• Level 2 (S) practicum: This practicum could include both Value Selling and iPad skills	
Sales Strategy: Value Selling (VS Associates coursework)	• VSA eLearning (pre-requisite) (Value Selling Framework Fundamentals eLearning course) o VS Framework and how it will benefit you o Your selling world o The Qualified Prospect Formula o O-P-C questioning process o Differentiated vision match o Mutual plan o Business and personal value o Power: who has it and how do you find them? o The Value Prompter • VSA Two (2) day "in-country" workshop	• eValue Selling Fundamentals activities: o Module 8 (The Value Prompter) activity • VSA workshop o Activities unknown	• (Internal) Level 1 (A): Follow-up Survey of VSA eLearning prerequisite coursework and VSA workshop -and- • (VSA) Level 2 (K): Informal scenario-based knowledge checks in VSA eLearning coursework -and- • (VSA) Level 2 (KS): VSA workshop assessments of knowledge and skill	• ValueSelling Framework Fundamentals eL course materials: o Workbook o Value Prompter Example with Questions o Value Prompter Example with Answers • VSA Opportunity Assessment Tool • VSA Diagnose your sales opportunity wizard
Value Selling Practical Application	• Value Selling within the organization o How our organization leverages the VS framework and strategy • Value Selling-Radius Alignment	• Value Selling vocabulary review activity (Metro) • "Selling Value Selling" role-play activity: o Prepare the Value Prompter o Prepare and give a sales pitch presentation that "sells value selling to a key sales influencer in company XYZ". *The activities above are follow-up reinforcement activities to the VSA workshop and NOT included in the VSA workshop.*	• Level 2 (K): Objective-based assessment quiz covering the Value Selling vocabulary -and- • Level 2 (S): Value Selling Practicum Assessment (rubric TBD). The SR will be evaluated on: o Use of VS vocabulary o Creation of our Product Value Prompters o Use of Value Prompters and VS strategy in a product sales pitch/presentation	TBD

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