2021 Direct Sales Onboarding Playbook

Next-level hacks to max out recruit commitment and increase revenue

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Recruit Productivity Rate*

We get it—you've been given a big challenge. If you own onboarding for a Direct Sales company, you're responsible for selling a new rep on your platform and activating the right actions. A tall order.

That's why most DS companies accept a sub-par recruit productivity rate (RPR) from their onboarding. They assume that 60% to 90% of reps won't sell a thing. They think there isn't much you can really do to increase productivity per recruit.

For these companies, the only answer is to increase the number of recruits. They spend more and more resources and time on filling the funnel.

> * ***Recruit Productivity Rate (RPR) = The ratio of the number of new reps that close one or more deals to the total number of recruits***

But increasingly, leaders in our space understand that activating sellers is a game of inches. They know that optimizing their sales onboarding **can significantly increase their RPR**. They are starting to push teams like yours for improved results.

The great news is that there is absolutely a way to get this done and along the way **speed up the first sale** and **increase sales volumes per rep** too. Our work developing solutions for the best gives us unique insight into what drives maximum results.

About ConveYour
We've been driving revenue growth for Direct Sales companies for over 10 years. Our onboarding and recruiting technology and consulting have activated over 100K reps for DS leaders like Vector/CUTCO, Vivint, and more. Our leadership team comes from the D2D/DS space and has built massive-scale marketing automation solutions for Fortune 50 enterprises. *Book a free consultation today* to learn more.

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What Onboarding Must Do

In most cases, onboarding has to take raw material—a green potential rep without much experience—and turn them into a salesperson. This transformation is so much more than just a download of product information or sales scripts. In our experience, onboarding with the highest RPR has to achieve each of these four key objectives:

1. **Build Belief** - The recruit has to be sold on the fact that they can achieve success with your platform
2. **Create Capability** - The recruit has to learn enough about the product and how to sell it to be effective
3. **Align Expectations** - The recruit has to have a realistic estimation of what it will take for them to achieve their goals
4. **Activate Next-Steps** - The recruit has to have clear, simple next steps, and an onramp to get those done

The following is a **playbook** to achieve each of these goals. Dive in and take action, or set up time with our leadership team to help you create a plan tailored to your unique needs and gaps.

Build Belief

If your onboarding program doesn't close a recruit, it's game over. Until they start selling, they're looking for reasons your platform isn't going to work for them. The best potential reps are comparing your platform to others out there. They aren't going to give your onboarding a lot of second chances.

That's why the best onboarding programs go to great lengths to build belief—creating confidence in the rep that they can be uniquely successful with your platform. It's surprising how many DS/Door-to-Door (D2D) firms don't view every minute of their onboarding process as what it actually is: one long sales pitch. Reps need four things drilled into them to build belief:

- ***"I believe in the product and company value for customers"***
- ***"Someone like me can win"***
- ***"There is a real chance I can win big"***
- ***"I will get the tools I need to be successful"***

Best-Practice Checklist to: Build Belief
Execution Imperatives

- ☐ Reinforce these messages frequently throughout the training and after it's done (with drip reminders).
- ☐ Use low-polish video across the board to add **authenticity and believability**. This generation is suspicious of highly-produced content—they want to believe that people **put up quick selfie videos because they believed what they were saying**.
- ☐ Create a podcast where past successful reps are interviewed. Drip these out to all reps and recruits.

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Build Belief

"I believe in the product and company value for customers"

- ☐ Show how your company or product is bettering the lives of customers—social proof about the product or service. Facebook posts, articles, etc. about the quality/impact of your company are critical. "You don't have to take our word for it..."
- ☐ Show a customer purchasing story demonstrating how the product is easy to sell due to the demand for it. Tie this to key trends that make it inevitable.
- ☐ Show how customers spend money, and how this purchase fits in their budgets. Most reps don't understand how budgets work for people that decades older than themselves.
- ☐ Demonstrate how the customer will be taken care of—after-sale service. Recruits worry about their reputation after a sale. Show how the company will improve their personal reputation.

"I believe someone like me can win"

- ☐ Use authentic video testimonials of successful "average" reps—not just the very top performers.
- ☐ Show videos of a diverse set of reps—age, life-stage, gender, ethnicity, etc. – so that most reps get a relatable "if they can do it, I can do it" example.
- ☐ Rep videos provide clear linkages to the playbooks they used for their success—make it clear that success is doable and straightforward.

"And, there's a chance I could win BIG"

- ☐ Show them examples of top performers' dramatic success; so they know there is no ceiling on their opportunity—some recruits are excited by big upside.
- ☐ Show stories of reps that are now leaders in the company—some recruits want to lead and manage.
- ☐ Show examples of how your company will ready them for life success with personal growth foundations—some recruits will be looking for big-picture impact.
- ☐ Demonstrate how the customer will be taken care of—after-sale service. Recruits worry about their reputation after a sale. Show how the company will improve their personal reputation.

"I believe this company will give me everything I need to be successful"

- ☐ Demonstrate that your training and rep support are world class compared to other platforms. Showcase reps coming from other platforms to highlight your training and support differentiators.
- ☐ Breakdown into simple numbers how a rep can get to specific levels of income in a given number of days. Show the math and clear inputs so that they see the importance of the playbooks in the rest of the training.
- ☐ Demonstrate repeatedly in broad terms how the program and company will give them fool-proof tools that drive results.

Create Capability

Most onboarding is about capabilities, often at the expense of our other categories. Our high-level recommendation for most onboarding programs is to shift the focus to belief and other key areas, while providing an easy to access "library" of tools and information that a fully committed rep will have at their fingertips, and dripping out that content over time. In this approach, you should also be using rep testimonials as a way to transmit best practice tools—building belief and creating capabilities at the same time. With that said, no onboarding is successful without providing key selling capabilities. Our methodology breaks these down into the following areas:

- **Facts they need to know: Key product information, checklists, memorized pitches, etc.**
- **Frameworks they must master: When reps need to read between the lines, and be flexible in their approaches, they need to master frameworks like selling or planning methodologies.**
- **Skills they must demonstrate: Reps have to build and practice the skill of giving pitches, starting conversations, initiating referral requests, etc.**

Simply covering this critical material just isn't enough. You have to 1) verify they learned the content, 2) reinforce days later to drive retention, and 3) in the case of skills, you have to provide the opportunity to drill them and provide feedback.

Best-Practice Checklist to: Create Capability
Execution Imperatives

- ☐ Identify "non-negotiable" information to drive ongoing drip assessments to verify the effectiveness of your training
- ☐ Drip out quizzes and assessments: 70% of content in trainings is forgotten within 24 hours, but reinforcing key data with quizzes spaced out after the training reduces "forgetting" by up to 60%.
- ☐ Gamify assessments to capitalize on competition—show recruits where they stand.
- ☐ Break-up long videos or content segments with different media and shorten video clip length to maximize attention.
- ☐ Provide easy to reference checklists and playbooks they can get to within a couple of clicks on their phones. Drip reminder links to these resources so they review them right before they have to take action.

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Create Capability

Facts They Need to Know

- [ ] Product and company knowledge: cover all aspects of your line, differentiators, and key selling points
- [ ] Customer profiles and segments—including buying and budgeting power
- [ ] Simple checklists and how-to's on:
    - [ ] Prospecting and getting referrals
    - [ ] Setting appointments
    - [ ] Giving a demo
    - [ ] Responding to objections
    - [ ] Closing
    - [ ] Asking for referrals
    - [ ] Following up

Frameworks They Must Master

- [ ] Your recommended selling methodology/framework—with enough of the why to allow the rep to make it their own
- [ ] Creating a personal action plan, with some ability to personalize and take ownership without jeopardizing success
- [ ] Customer strategies that allow the rep to qualify prospects and select the right pitch for them

Skills They Must Demonstrate

- [ ] Video demonstration of key 1-1 selling interactions—ideally several different scenarios
- [ ] Selling skills: Allow recruits to upload self-recorded videos for feedback from managers and trainers:
    - [ ] Call to schedule the appointment
    - [ ] In-person conversation initiation (D2D)
    - [ ] Pitches and demos
    - [ ] Countering objections in response to a pre-recorded customer video
    - [ ] Follow-up calls

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Align Expectations

We don't want to overwhelm recruits with how hard their onboarding is going to be. With that said, we have to make sure they know they will have to apply themselves to be successful. If we've done the job of building belief, we need to balance and reinforce that work by showing them what this is going to look like. Aligning Expectations is where:

- **"I know what this will take" - recruits need realistic expectations about the time and effort required to be successful so that they don't end up quitting later when the going gets tough.**
- **"I have learned self-management" - most recruits will need to up their game on time management, detail orientation, follow-through, etc.**
- **"I have reasonable expectations of my managers/uplines" - recruits need to understand the limits of what can be done for them.**

Best-Practice Checklist to: Align Expectations
Execution Imperatives

- ☐ Use authentic, "selfie" style videos from reps to teach this topic—much more powerful coming from people they relate who have played by these rules
- ☐ Create feedback loops and self-commitments—get recruits to create plans that help them move toward action while helping them see what this is going to take.

Align Expectations

"I know what this will take"

- ☐ Break down the hours, months, calls, doors, etc. in detail for the success examples used to build belief.
- ☐ Have the recruit create a record a video with their own action plan that demonstrates they understand the math you are teaching. Allow them to upload that video for feedback from managers or other reps.
- ☐ Show examples of people who did this part-time to demonstrate that part-time work creates part-time results.
- ☐ Exercises of recording pitches and practicing calls will also help them come to grips with what this will feel like.
- ☐ Experiment with interviewing people who didn't get the results they wanted - get to the "why" so they understand the "how".

"I know how to manage myself"

- ☐ Cover time management, and demonstrate with examples what self-management requires and what needs to change to be successful.
- ☐ Cover goal-setting.
- ☐ Cover a day in the life, with a look at the calendar, what the rep is actually doing at different times, and how they organize their activity.
- ☐ Briefly cover tools like phone calendar, to do list, reminders, etc.

"I have reasonable expectations of my manager"

- ☐ Videos from successful sellers explain with some level of depth what their manager can and can't do for them.
- ☐ Videos have one example of a rep who thought they would get a certain type of hand-holding but then they realized it was on them to be successful.

Activate Next Steps

In addition to reminding recruits to get through the training, world-class onboarding pushes and reminds recruits how to activate. If you want to increase the number of recruits taking action, you have to remove as much friction from the process as possible. We cover checklists for these key action items:

- **Signing a contract**
- **Set up a meeting**
- **Fill out a plan**
- **Download an app**

Best-Practice Checklist to: Activate Next Steps
Execution Imperatives

- ☐ Cover next steps several times in the onboarding and make sure you quiz them to drive retention
- ☐ Track actions, and send at least six automated reminder messages for each step in the chain
- ☐ Make sure ALL key actions can be easily completed on mobile. Audit the usability and difficulty of all next step actions.
- ☐ Send text messages with quick-links to precisely the action step they need to do next
- ☐ Send welcome emails with all the action items in one place so they can check them off easily
- ☐ If you send physical goods, be sure to text reps the link to be able to create a support case if they haven't received their goods yet

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Activate Next Steps

Signing A Contract

- ☐ Ensure they can sign the contract on their mobile device without downloading an app
- ☐ Provide resources like an FAQ or videos that address concerns they might have on the contract. It may be worth providing chat or phone support just for the contract.

Live meeting with manager

- ☐ Send the contact information of their upline manager via text message—ideally as a "VCard" they can easily add to their phone as a contact
- ☐ Provide a link to the schedule of the manager so they can book a time that works for both parties. This also reinforces professionalism and connects them to their calendar.
- ☐ Automatically send them a calendar invite when they have selected a time.
- ☐ Provide a video link to a video on expectations for the call or meeting.

Submit A 30 Day Plan

- ☐ Provide a mobile-ready form for them to fill out with clear guidance and in-line links to video tutorials and reminders
- ☐ Have them record and upload a selfie video explaining the plan to their manager for feedback

Download an App

- ☐ Text them a link that will automatically take them to the Apple App Store or Google Play Store for your seller app.
- ☐ Text them a quick video of what they can do with the app and why it's important.
- ☐ Ensure that you have the right address for them to get the physical items that they need to be successful.

If you follow this detailed checklist, we're confident you'll see major increases in your Recruit Productivity Rate. This is a big list, but you can theme it and drive toward it year after year. We would love to help you identify where to focus. Book a free consultation and we can get started increasing the effectiveness of your onboarding.

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