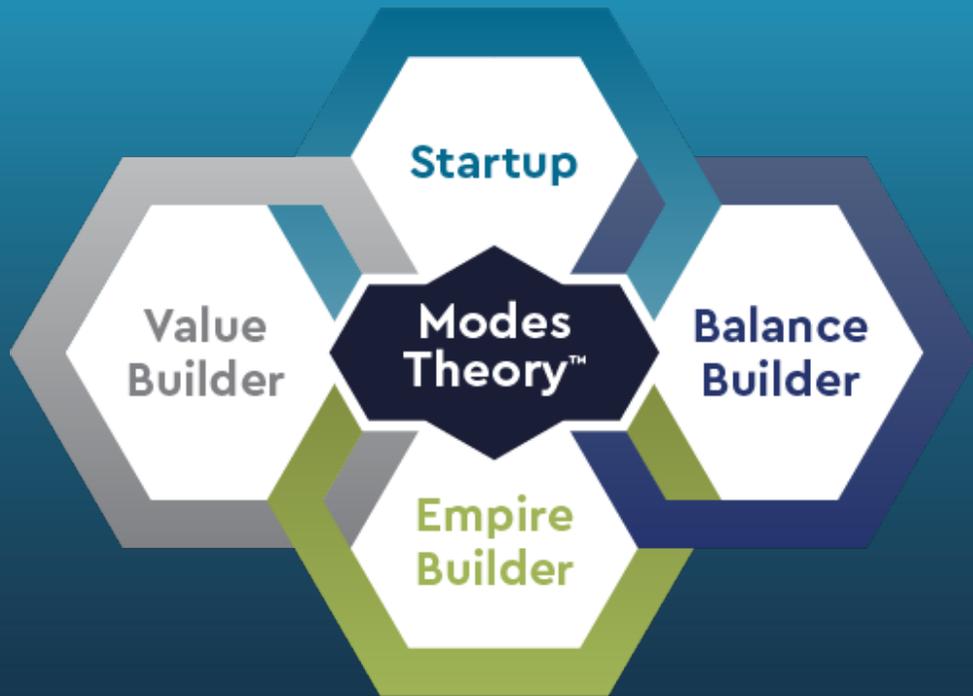


# Journey to 8 Figures: Hiring, Onboarding & Managing Your Sales Team

Sales Growth Kit: From Start up to Balance & Value Builder



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# Modes Theory

Complete Your Assessment

[connectwise.com/modes](https://connectwise.com/modes)



# What Problem are we Trying to Solve?

- Increase probability of a successful sales hire!
- Set you and your new sales professional up for success as they join your team.
- Keep weekly activities on track to create consistent performance.



# Sales Hiring



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# Before Hiring (Define the edges)

Job Description  
(Role)

Compensation  
Plan

Defined  
Milestones (30,  
60, 90, 6 months,  
year)

# Hiring Strategy



EXPERIENCE VS ROOKIE



TECHNICAL VS SALES

# Three Most Common Questions



Where do you look

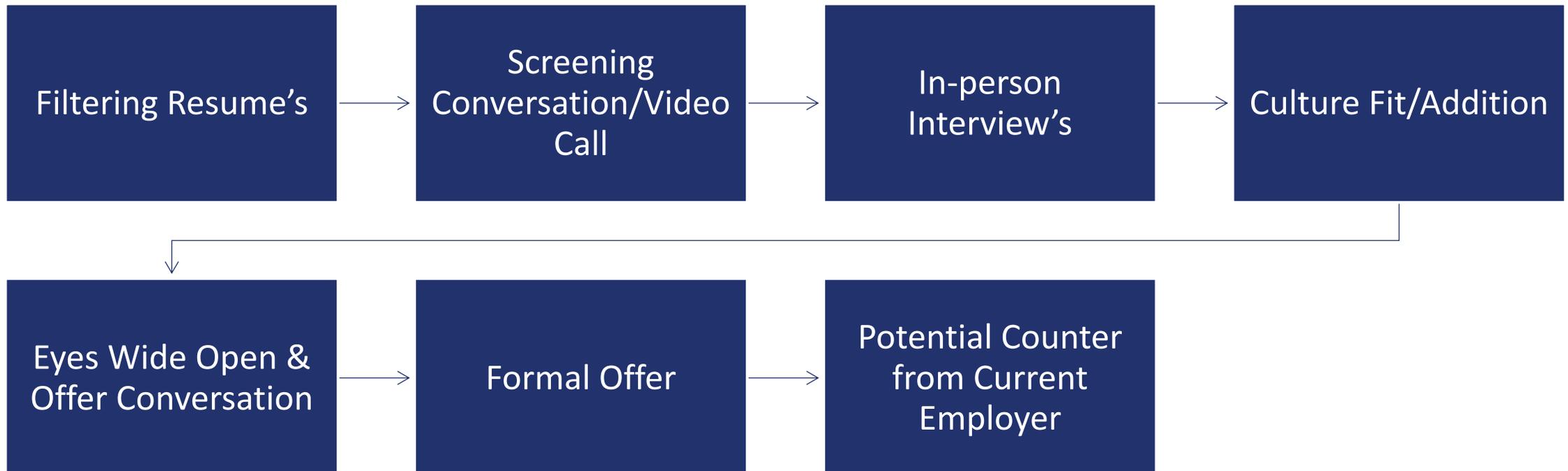


What traits are you seeking



What type of Sales Experience

# Interview Strategy



# Offer Accepted! You are not done (Before Start Date)

Welcome Package to Individual / Family

Background Check

Desk Prepped for First Day

Equipment - Laptop

Company Apparel / SWAG

# Sales Onboarding



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# Day One

This is where you set the expectations

- *Everyone asks how was your first day*

Tell the Hero Journey (Story of your company)

- *Everyone ask about your new job*

# Pro Tips Onboarding & Setting Expectations

Schedule out First Two Weeks of New Team Member's Calendar



Share the Onboarding Document with the New Team Member in Teams (in your one-on-one chat with them)



Daily or every other day check-ins for the first two weeks



Its YOUR responsibility to ensure progress towards 30, 60, 90-day milestones!



Remember (Satya Nadella): Clarity; Energy; Results

# Recommended Training Method

01

New Team  
Member  
Observes  
Trainer

02

New Team  
Member Does  
– with Trainer  
Observing

03

New Team  
Member Does  
Solo

04

Wash, Rinse,  
Repeat for all  
Key Tasks

# Sales Managing



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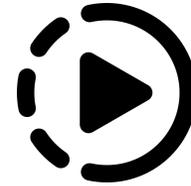
*“Sales is the easiest worse paying job you’ll ever have or it’s the hardest best paying. It’s up to you which it’ll be.”*

Sales management isn't complex, but it is hard.

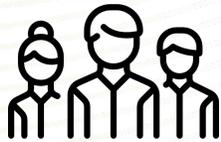
# Management is More than the People



Processes



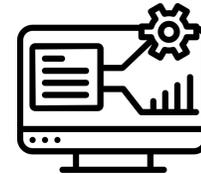
Motion



People



Goals



Systems

# Managing Motion

Key Behaviors that need to be executed consistently

Each role has different key behaviors

Train and coach on how to execute the key behaviors

Track and measure weekly

Iterate these key behaviors as needed



# Managing Goals

This is where you define what winning looks like!

Sales Goals need to be Realistic & Attainable

The Goals should be aligned with your business goals

Goals need to be within the influence/control of the rep

Monthly, Quarterly & Annual Targets

Measure Quarterly & Annually

Adjust and Iterate Annually as Needed





# Managing People



What's your cadence?



What's the agenda



What are your Scorecard items



Pipeline reviews



# Managing Processes

Defined Sales Stages for Opportunities

Sales to Project Process

New Client MRR Sales Process

Onboarding Client Process

Service to Sales Escalation Process



# Managing Systems



CRM notes (Calls & Meetings)



Contact record minimum standards



CRM & PSA alignment



Ticket management





# Managing Systems — Deal Management



Next Step



Confidence



Close Date



Age

Deal Management



# What's most important

1. Get them tracking activities
2. Routine cadence of review – Activities first and then individual opportunities
3. Where are they stuck
  1. Qualifying
  2. Quoting
  3. Closing

# Call To Action!

Access the Journey to 8 Figures  
Sales Growth Kit here:

[Hub.ConnectWise.com/GrowthKit](https://Hub.ConnectWise.com/GrowthKit)

Videos of Delivery  
Resources in a zipped file

Steve & Nate are Launching a  
Sales YouTube Channel

Subscribe to [@MSPGrowthKit](https://www.youtube.com/@MSPGrowthKit)  
Channel on YouTube and/or go  
to: [MSPGrowthKit.com](https://MSPGrowthKit.com)

+

*Don't forget to fill out your*

# SESSION SURVEY

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Open for Questions!

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