



# How to Onboard New Hires Smarter and Faster

Creating a better path to success  
for your new hires



A person with dark hair and glasses, wearing a blue t-shirt and large black headphones, is sitting at a wooden desk. They are looking at a laptop screen. The desk is cluttered with various items, including a laptop, a mouse, and some papers. The background is slightly blurred, showing a wooden wall and some other people in the distance.

# Introduction

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Hiring and training new Sales Development Reps (SDRs) and Account Executives (AEs) is essential to scaling your company. Every day that you spend on training before a salesperson is fully ramped up is lost productivity and revenue.

In our recent survey of hundreds of sales professionals, we looked at how businesses, ranging from startups to late-series companies, approach hiring and onboarding new reps in the first 30, 60, and 90 days.

The more your business grows, the more pressing it will be to expand upon your existing sales team. When you hire new SDRs and AEs, you'll want to set realistic expectations for your onboarding timeline and when you expect them to perform their key functions at the top of their game. And in an increasingly remote workforce, it's more challenging than ever to make sure your new hires have what they need, when they need it, to ramp efficiently.

In this eBook, we'll cover industry benchmarks and our own best practices in two essential areas:

- ➞ 30/60/90 plans
- ➞ The ramping and onboarding process





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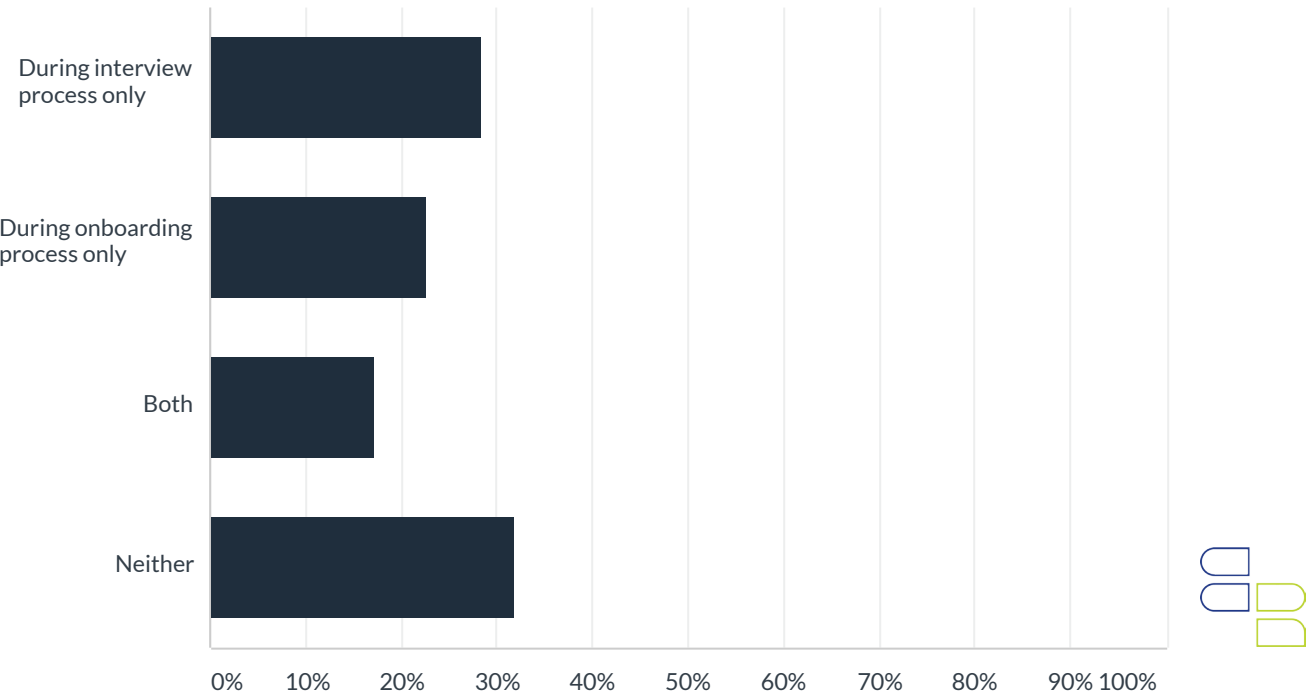
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## What’s the right approach to a 30/60/90 plan?

According to our survey, over two-thirds of respondents ask candidates for a 30/60/90 plan. Not only do these plans set precedence for both parties’ expectations from the jump, but they also ensure that time isn’t wasted trying to fit the wrong candidate into the role.

Plans are most commonly requested during the interview process this process increasingly takes place during the interview process, as seen in the chart below, to display their understanding of the company and role, and demonstrate how they would create and track their goals. This also allows a sales manager to see how willing a candidate is to hold themselves accountable for their progress (or lack thereof).

### Do you ask job candidates for a 30/60/90-day plan during the interview and/or onboarding process?



ANSWER CHOICES	RESPONSES
During interview process only	28.49%
During onboarding process only	22.58%
Both	17.20%
Neither	31.72%



## When do managers ask for 30/60/90 plans?



### During the interview process only

This can help hiring managers in the final stages of the interview process identify how each candidate would approach their first months on the job, thus making their decision a bit easier.



### During the onboarding process only

Though the employee may have already been hired, initiating a 30/60/90 plan during this stage helps bring both the new hire and the management team into alignment. Sales candidates who provide a plan during onboarding display how they operate and the speed at which they feel proficient. This can limit miscommunication and equalize expectations on both sides.



### During both the interview and onboarding process

The reasoning behind this is simply that expectations can change from when an employee is prepping for the job compared to when they first sit at their desk. It's difficult for a sales candidate to flesh out their exact plan for their first 30, 60, and 90 days on the job based solely on a job description. Once the candidate has been introduced to the company's workflow, they should update their plan as necessary.





“

It's pretty common to have senior candidates present a 30-60-90 plan as a final exercise. Yet I find most of the presentations are pretty generic and stale. Make them fun and engaging. People are dying to be entertained.”



Scott Britton - Co-Founder





## What makes a good 30/60/90 plan?

It's important to remember that a 30/60/90 plan isn't the place for a new hire to show off their chops. Sure, they might have a ton of experience under their belt. But a good 30/60/90 plan explains how they will integrate themselves into your company, learn your objectives, and become a lead player in your team. Therefore, a good plan will highlight a clear course of action for how they will reach related business goals.

The key elements to look for in a 30/60/90 plan are:

- 1 **An understanding of the high-level priorities for the company and team**
- 2 **An outline of the core company goals and objectives the candidate will play into this year**
- 3 **Familiarity with the target market, key products and/or services, and competition**
- 4 **How to establish connections within the team and organization**
- 5 **When all required company training will be completed**
- 6 **A clear sales plan**

Ultimately, the plan should outline how a candidate anticipates learning your business and projections for when they can actively get some skin in the game.

They should also be engaging. A 30/60/90 plan is one of the best opportunities for candidates to make themselves stand out. Unfortunately, it doesn't always play out this way. As Scott Britton, founder of Troops.ai, says, "It's pretty common to have senior candidates present a 30-60-90 plan as a final exercise. Yet I find most of the presentations are pretty generic and stale."

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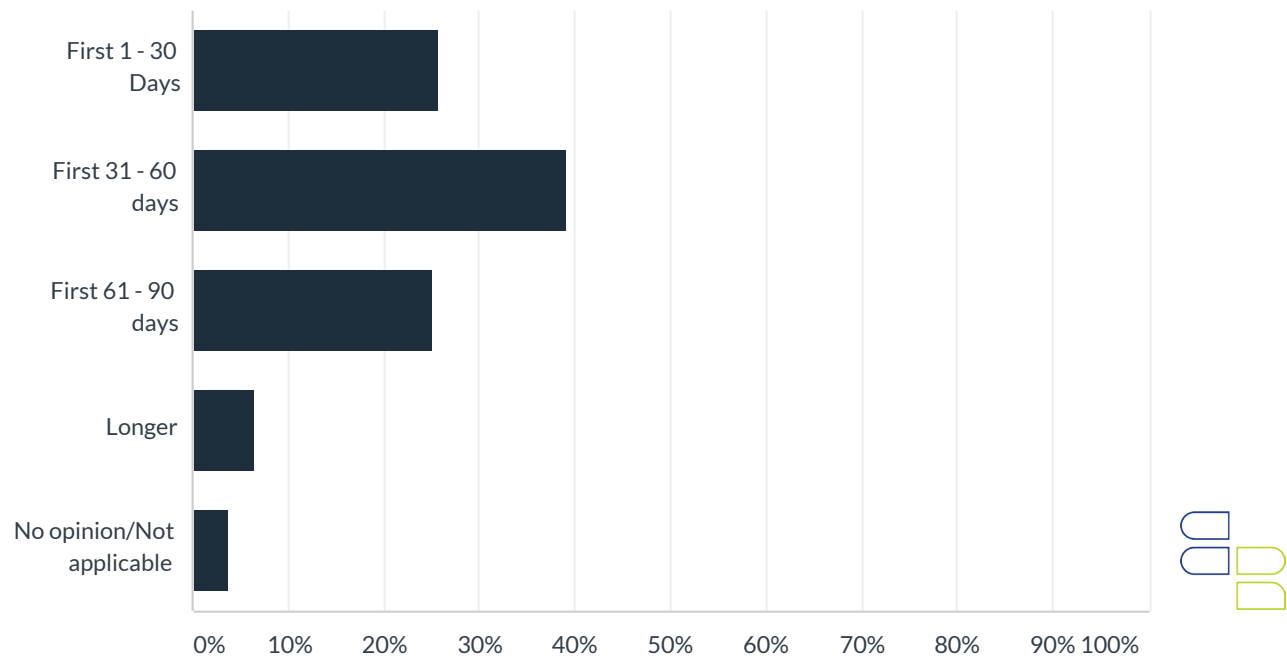
# Optimizing the Onboarding Process

30/60/90 plans are so important because they lay the foundation for onboarding. The onboarding process is a test of how quickly you can get your reps up and running - and earning. Successful onboarding requires giving your new hires ample resources and coordinating closely with them throughout the process. This is especially true in a workforce ever more oriented around remote work.

After analyzing hundreds of responses from our survey, a number of trends and key takeaways emerged about common onboarding expectations. The thing that jumped out at us the most: **It takes two whole months for reps to get a strong understanding of a company’s product(s) and competitors.**

➔ **65% of survey respondents expect their new hires to be in-tune with their business’s target market and products/services within the first one or two months.**

## At what point do you typically expect new sales reps to have a strong understanding of your target market and products/services?

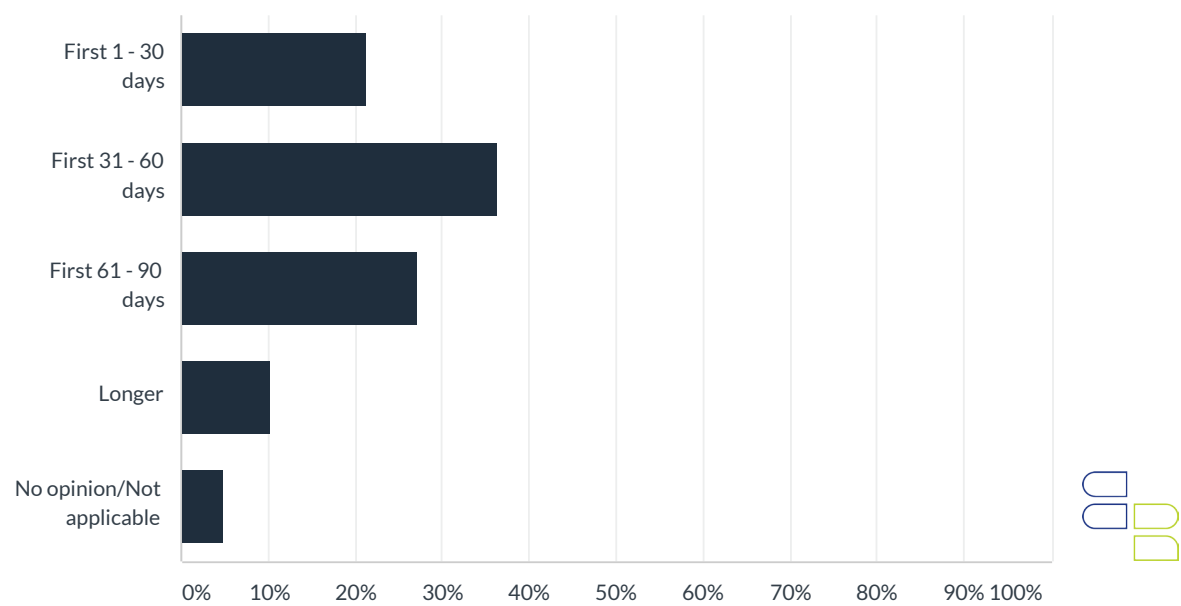


ANSWER CHOICES	RESPONSES
First 1 - 30 Days	25.67%
First 31 - 60 days	39.04%
First 61 - 90 days	25.13%
Longer	6.42%
No opinion/Not applicable	3.74%



➔ And, 58% expect new sales reps to have a strong understanding of the competitive landscape within that same timeframe.

At what point do you typically expect new sales reps to have a strong understanding of your competition and your specific competitors?



ANSWER CHOICES	RESPONSES
First 1 - 30 days	21.39%
First 31 - 60 days	36.36%
First 61 - 90 days	27.27%
Longer	10.16%
No opinion/Not applicable	4.81%

Making onboarding materials available to new sales reps upon offer acceptance allows them to become in-tune with their new role immediately. These materials should include a digestible yet comprehensive overview of your product's value props, target market, and competitive landscape.

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## How to Accelerate Ramping and Onboarding

You may be reading this and thinking, “Does the timeline really have to be this slow? Why can’t I expect a strong understanding in the first month?” Truthfully, you’re not alone in this thought process. A quarter of survey respondents also expect their new hires to get with the program within the first 30 days on the job.

Realistically, delays within the first 30 to 60 days mean it takes significantly longer for your sales representatives to begin bringing in new business. This can bottleneck your pipeline, causing delays for AEs and frustrating other SDRs that have been on the job for longer.

Consider these four ways to accelerate the process. With smart use of technology, all of these are feasible both for in-office and remote employees.

### 1 Implement Preboarding Materials

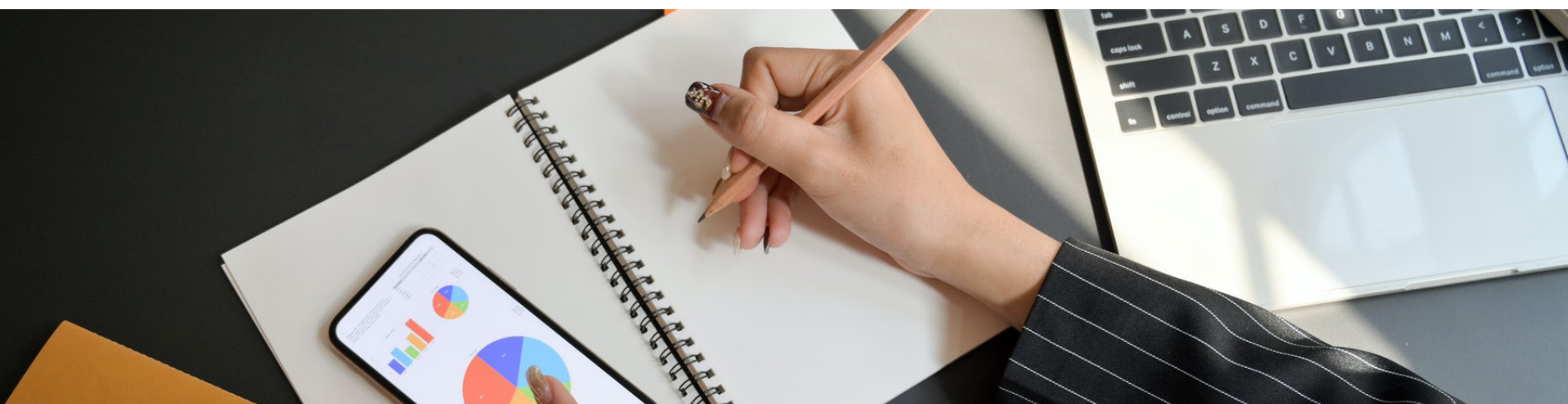
While some may scoff at the idea of preboarding before onboarding, preboarding is an effective way to get new hires familiar with the company before even walking through the door. Making onboarding materials available to new sales reps upon offer acceptance allows them to become in-tune with their new role immediately.

These materials should include a digestible yet comprehensive overview of your product’s value props, target market, and competitive landscape. Promising new hires will take it upon themselves to delve into the material right away, especially if it means they’ll be selling faster.

### 2 Establish Team Building Activities

Team building events such as weekly lunches or group brainstorming sessions with one or more executives kick-start working relationships and provide your new hire with an anchor. These events can establish a relationship with a mentor, such as a long-running SDR, AE, or sales manager.

Not to mention, team building can create an opportunity for your new hires to ask any questions, provide feedback, and engage with the company’s overall mission. This can help the newbies feel a little less new and get them involved with company initiatives right off the bat.



“Survey new employees daily **with these questions** so that you can adapt your onboarding as well as improve it over time.

You’d be surprised what you learn and what people are willing to communicate in a form that doesn’t come out face-to-face.”



**Scott Britton**  
Co-Founder  
 **TROOPS**

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### Have a Clear Example of What Perfection Looks Like

It’s a sales manager’s responsibility to clearly define what’s expected at each stage of the sales cycle. It’s a good sales manager’s duty to clearly define what “perfect” looks like.

If you want new hires to strive for perfection, they need to know what that means to you. Provide scenario-specific information:

- ✓ How does a perfect discovery call sound?
- ✓ What is an example of perfect objection handling?
- ✓ What does a perfect competitive response sound like?

Have more experienced reps model this information so that you’re showing and not just telling.

4

### Implement an onboarding survey that new sales rep fill out each day or week.

Having new sales hires complete an onboarding survey at the end of each day allows them to reflect on what they are learning and get up to speed faster.

Britton recommends including the following questions in your onboarding survey:

- ✓ How did today go, on a scale of 1 - 10?
- ✓ What went well?
- ✓ What didn’t?
- ✓ Were you confused about anything?
- ✓ Anything else?

“Survey new employees daily with these questions so that you can adapt your onboarding as well as improve it over time,” says Britton. “You’d be surprised what you learn and what people are willing to communicate in a form that doesn’t come out face-to-face.”



## AEs Should be Performing Solo Demos Within 30-60 Days, Meeting Quota by 90+

➡ Regardless of whether AEs are promoted from SDR or hired externally, most respondents don’t expect them to be closing at a rate that aligns with quota until their third month.

At what point do you typically expect an AE who was promoted from SDR to be fully ramped, and closing at a rate that aligns with quota?

ANSWER CHOICES	RESPONSES
First 1 - 30 days	6.99%
First 31 - 60 days	26.88%
First 61 - 90 days	33.87%
Longer	17.74%
No opinion/Not applicable	14.52%

At what point do you typically expect externally-hired AEs to be fully ramped, and closing at a rate that tracks with quota?

ANSWER CHOICES	RESPONSES
First 1 - 30 days	5.91%
First 31 - 60 days	13.98%
First 61 - 90 days	38.71%
Longer	30.65%
No opinion/Not applicable	10.75%

➔ While they might not be fully ramped, more than 35 percent of respondents expect both internally promoted and externally hired AEs to be performing demos on their own within the first 60 days - the most common answer from the choices given. This can leave questions as to how you should be setting expectations with new AEs.

**At what point do you typically expect an AE who was promoted from SDR to be performing demos on their own?**

ANSWER CHOICES	RESPONSES
First 1 - 30 days	27.27%
First 31 - 60 days	35.29%
First 61 - 90 days	16.04%
Longer	8.02%
No opinion/Not applicable	13.37%

**At what point do you typically expect externally-hired AEs to be performing demos on their own?**

ANSWER CHOICES	RESPONSES
First 1 - 30 days	17.11%
First 31 - 60 days	35.29%
First 61 - 90 days	26.20%
Longer	8.02%
No opinion/Not applicable	13.37%



To those who expect AEs to take 3 months to start pacing toward quota, regardless of whether they were promoted from SDR or hired externally, we say: reconsider those expectations. Ask yourself if you could feasibly ramp your promoted AEs in the first 60 days, rather than 90. This could lead to more revenue for your company.

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## Setting Expectations for AEs Hired Through Internal and External Channels

On the one hand, you may anticipate promoted AEs to ramp faster than external hires.

This can be because:

- ✓ They've already adjusted to company culture and know how to thrive in their current work environment.
- ✓ They've already been educated on the product's value props, functionality, and competitive landscape.
- ✓ They have pre-existing connections within the company and will know whom to reach out to with any immediate questions.

With these advantages, AEs who were promoted from SDR can ramp quite quickly. To those who expect all AEs to take 3 months to start pacing toward quota, regardless of whether they were promoted from SDR or hired externally, we say: reconsider those expectations.

Every team is different, but ask yourself if you could feasibly ramp your promoted AEs in the first 60 days, rather than the 90 most commonly cited in the survey. This could lead to more revenue for your company.





## SDRs Are Expected to Ramp More Quickly Than AEs

Many believe that SDRs require less training than AEs. As a result, they're most commonly expected to be pacing toward quota in their second month, while AEs are most commonly expected to be pacing toward quota in their third month.

In fact, more than 34% of respondents expect SDRs to be fully ramped and booking demos at a rate that tracks with quota by the end of their second month, compared to the mere 14% that expected externally-hired AEs to be fully ramped within the same timeframe.

## Our take: Don't Rush the Onboarding Process for SDRs

The assumption is that, as a junior position, SDRs have an easier job and should, therefore, ramp faster. This ideology can cause people to rush the onboarding or ramping process.

Rushing the ramping process for SDRs can create several unforeseen and unwanted side effects, including:

1

### Rushed onboarding leads to lower sales efficiency

Without the proper time to learn, employees are thrown into the deep end, requiring excess time to return to training modules or re-hire.

2

### Rushed SDRs will not be speaking to the correct buyer

Without a thorough understanding of customer personas and brand identity, your SDRs' pitch can be off base.

3

### It's more costly to have high SDRs churn rates than it is to allow time for SDRs to train properly

Throwing your SDRs into the deep end can cause them to churn. Repeated hiring costs have a larger impact than simply giving your employees the extra 30 days they need to perform.



A woman with curly hair is smiling while working on a laptop. The background shows a window with a view of a city. A blue semi-transparent box is overlaid on the left side of the image, containing text.

## Perfecting the Hiring & Onboarding Process for New Sales Hires

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SDRs and AEs are the lifeblood of most companies, consistently pumping new business into the pipeline. When sales managers neglect to implement efficient onboarding processes, sales candidates can fail before they even have the chance to succeed. Not only does this result in exorbitant hiring costs, but it can bottleneck your pipeline and negatively impact business growth.

With thorough 30/60/90 plans and an efficient onboarding process, both you and your new hire can set realistic expectations for their first few months on the job. With an understanding of industry standards and how to properly pace new hires, you both can work effectively towards success.



# Let's Get In Touch

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Betts Recruiting  
415.318.7520  
[www.bettsrecruiting.com](http://www.bettsrecruiting.com)

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