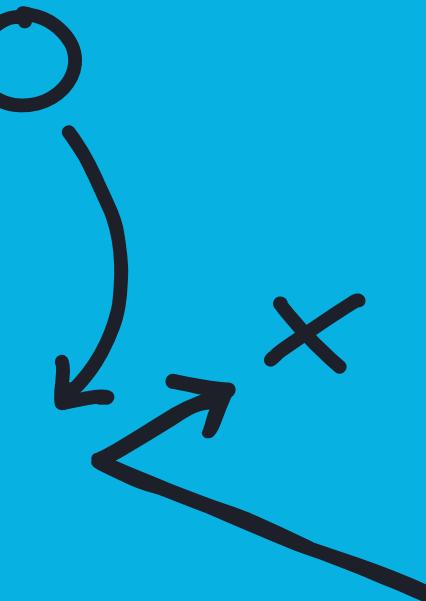


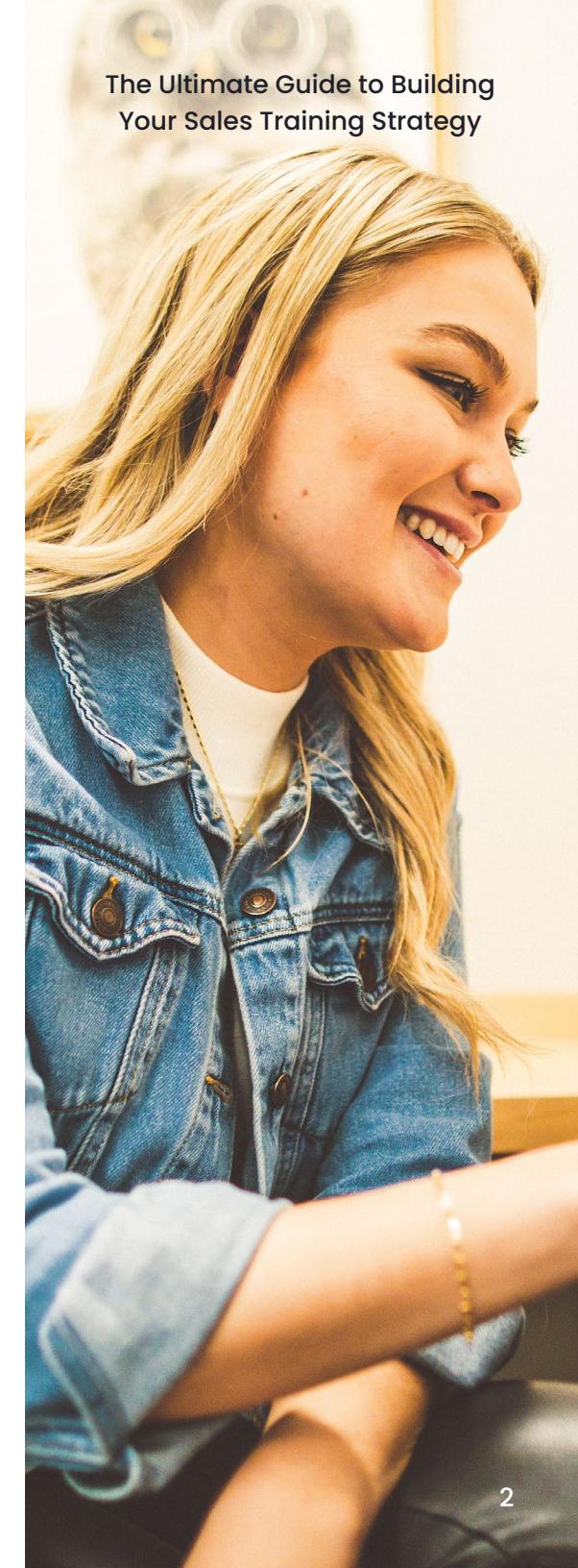
# The Ultimate Guide to Building Your Sales Training Strategy

Why Learning Will Be Your  
Competitive Edge in 2023



Program Ideas, Metrics  
to Measure, and Tips  
to Get You to the Top





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# Introduction

For most businesses, their greatest expense is talent—and according to Forbes, a majority of sales talent lacks basic selling skills. What does this insight tell us? It says that our industry is underinvesting in our most valuable (and most expensive) asset: our people.

The current generation of sales reps expect performance feedback, knowledge transfer, and sales training on the job. Yet, only 17% of companies report that they have an effective training program. If you fall in the other 83% of teams who need help building a sales training strategy and recommitting to rep and team development—this book is for you.

The following chapters explain how to make a business case for sales training. You'll learn how to positively influence company-wide OKRs including eNPS and employee retention alongside revenue goals like meetings set and quota attainment. Plus, gather ideas for what training courses to write first, ways to measure their success, and best practices that reinforce high-performing behavior like the SMART framework.

Going into an unpredictable new year, one thing is certain: **leaders like you who prioritize learning will come out on top.** Excited to be on this journey with you.



**Emma Shippee**

Senior Enablement Manager, Ambition

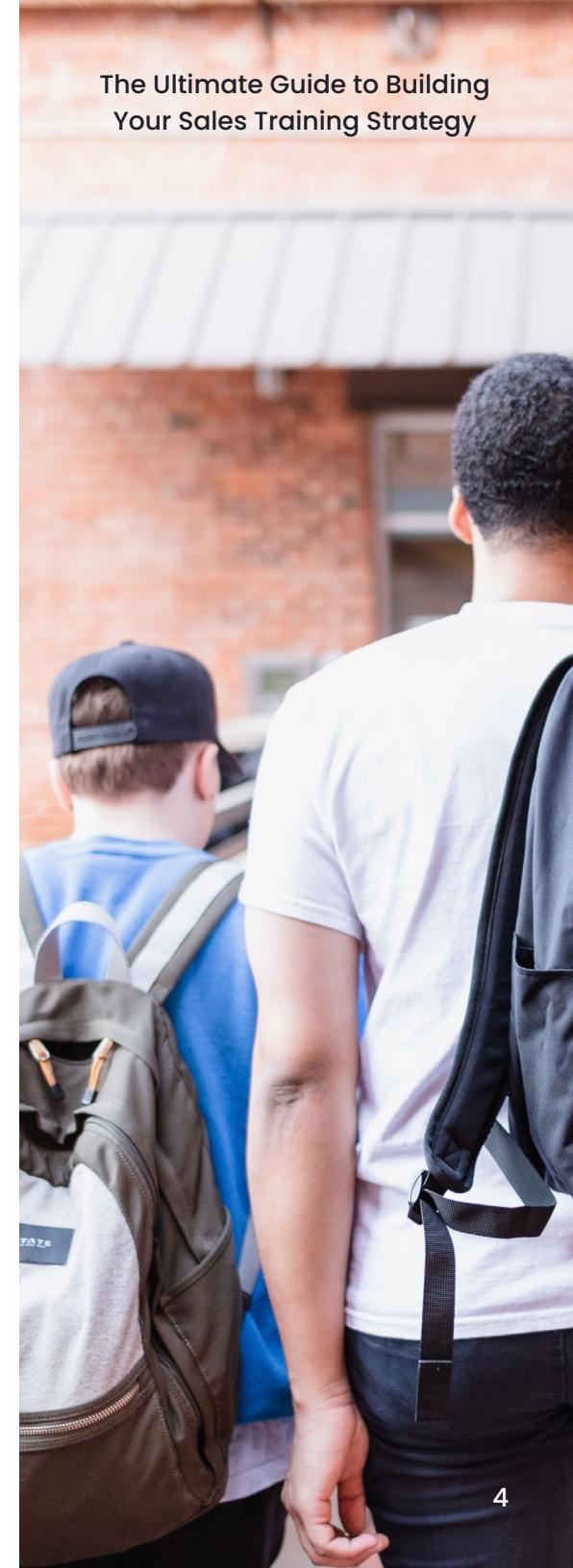
## CHAPTER 01

# How to Build the Best Sales Training Program for Your Team

If you want to develop a world-class sales team, the education can't stop after onboarding. Your people need ongoing development, training programs, and a holistic *Coaching Orchestration™* strategy that will help them sharpen their skills and become more intuitive sellers.

Sales training helps sellers learn and build upon their selling skills, product knowledge, and techniques. These programs can be in-person, virtual, or completed independently and should address specific skills or challenges your team faces. Great sales training leads to increased performance and revenue, but the benefits extend beyond just selling. You'll see the value of training reflected in your culture through increased retention and job satisfaction.

While there are many different ways to think about sales training programs and what you want to accomplish, the ultimate goal is to help reps develop behaviors that become second nature. In this chapter, I'll explain 5 key benefits of successful sales training, how to identify the best sales training program for your team, and outline the questions and steps I follow when creating a training program.



# 5 Reasons You Should Invest in Sales Training for Your Team

The best sales training and coaching creates a ripple effect that continues on and on while slowly and steadily altering a culture and eventually creating tidal waves of impact.

Many people want the results of great coaching, but they spend their time trying to shortcut the process instead of building replicable programs and investing the required time and resources to see those programs through to completion.

But seeing it through has incredible outcomes. Coaching at the right time, with the right metrics, and through a predictable program has been proven to increase productivity and performance, improve retention, raise employee satisfaction, improve revenue, and strengthen cross-functional alignment.

## 1. Increased productivity and performance

Inaction in sales is often due to a lack of confidence—confidence in what a rep is selling, confidence in one's ability to handle objections, confidence in CTAs, and so on.

The best sales training instills confidence in reps by teaching them how to technically execute their job. This requires a bit of a relationship, some ability to empathize, and consistency.

Plainly stated, only meeting with reps once or twice a month, and merely following a slide deck to completion will not result in increased confidence, productivity, or performance.

Reps and their coaches need ***consistent check-ins*** that evaluate more than performance metrics alone. Reps are human beings, and this necessitates check-ins that recognize the human behind the numbers. Performance improvements tend to flow from reps whose managers place an emphasis on trust, ***accountability***, and training. Managers must invest consistently in their relationships with their reps.

## 2. Higher retention

When a rep is motivated, encouraged, and equipped, they are much less likely to actively seek out a new opportunity. Unfortunately, many leaders neglect one or more of these areas because they claim that their reps are being compensated well for their work. While many of us do need to see the paycheck validate our efforts, that is not enough to drive long-term retention.

Employees need to feel connected to their work, their colleagues, and pursue a calling or purpose that is bigger than their work. Intentionally ***coaching the whole person*** is a great way to show someone that you care about their calling and that you want to play a supporting role in their pursuit of purpose at work.

The screenshot shows a software interface for sales training. At the top, there's a header with a search bar and tabs for 'PREP', 'CONVERSATION', 'METRICS', 'GONG', and 'ACTION PLANS'. The 'CONVERSATION' tab is active. Below the header, a sidebar on the left has various icons. The main content area shows a 'Check-In' for 'Ross O'Neal' on '30th, 2022 8:00 pm EDT' with a 'Completed' status and a 5-star rating. It includes sections for 'How do you think you're doing?' (with a note: 'Honesty, I always feel behind in some way. It always feels like one step forward two steps back.'), 'What are you most proud of since your last performance review (or since you started your role)?' (with a note: 'Completing the management training program.'), 'Where do you see room for improvement?' (with a note: 'I'm good at starting projects but need to execute and finish more things.'), '[ADVICE FOR ME]: What can I do or stop doing that would make your job easier?' (with a note: 'I need more feedback, even if it's harsh. The more I know the more I can improve.'), '[DEVELOPMENT]: What is your dream job here? Why?' (with a note: 'I would love to explore sales operations, being able to streamline processes for dozens of people.'), and a 'Rating' section with four categories: 'Coachability', 'Engagement', 'Preparedness', and 'Average', each with a 5-star rating. Below these are sections for 'Action Items' (1), 'Notes' (1), and a 'View Notes from Previous Program Check-In' button. The notes section contains a note from 'Ross O'Neal' about reviewing Q4K progress and another note from 'Maritza Diaz' about under-performance.

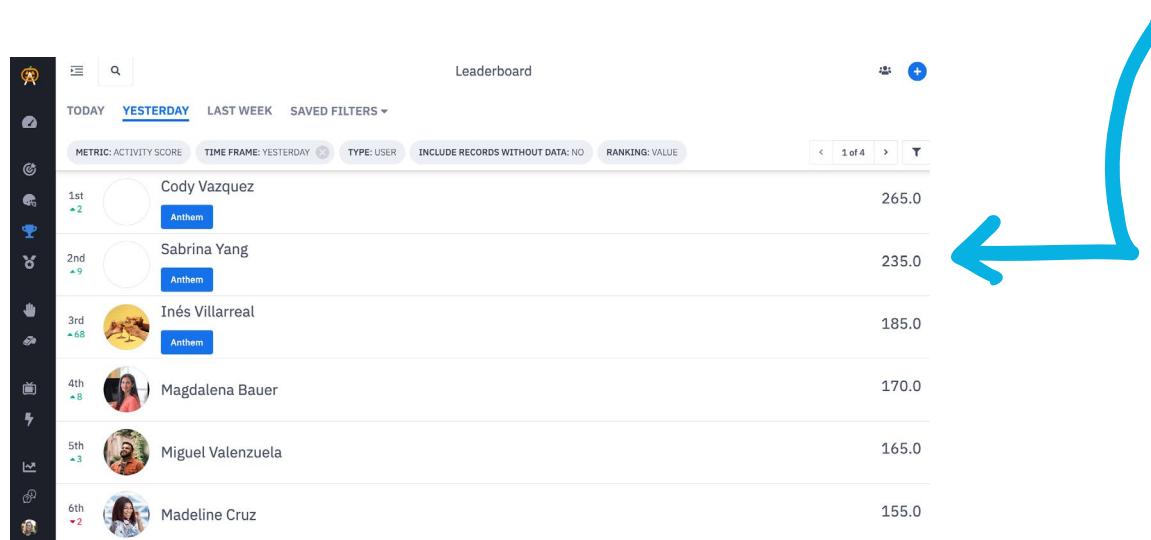
### 3. Higher employee satisfaction

Generally, employees crave clear goals and expectations. Most people want to know the requirements to be successful and the rules to get there (ROE). We want to know where we stack up, where we fall short, and how we can improve. Just look at the success of FitBit, Peloton, and Apple Watch over the past few years. Keeping goals and milestones visible fills us with motivation and a sense of accomplishment.

Good sales coaches 1) set clear expectations, and 2) coach towards these expectations with patience and understanding, meeting their reps where they are and without judgment.

Bad coaches fail to do one or both of these. Giving clear goals with no training is just as unproductive as giving zero goals with fantastic training.

Fortunately, you can invest in [sales training software](#) and [gamification](#), so reps can know what they are chasing, and how close they are to their target. When you add [coaching](#) to the mix and give qualitative feedback alongside performance feedback, incredible results will follow.

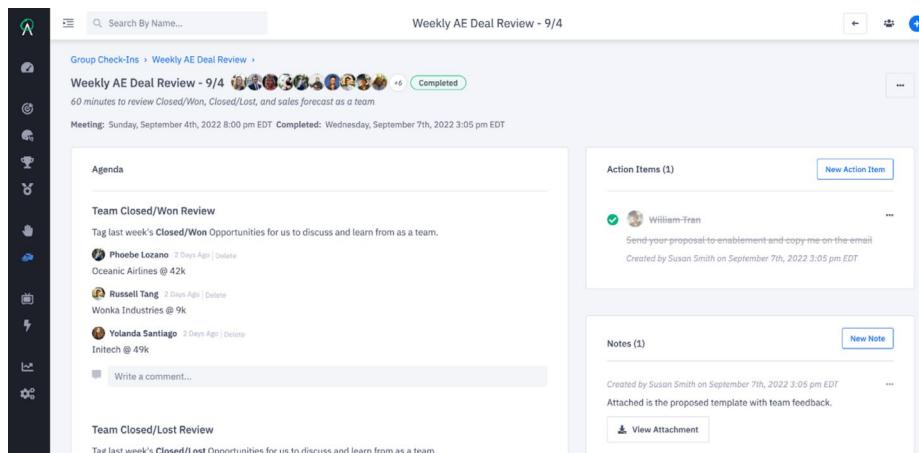


## 4. Increased revenue

Everyone in sales wants to win. Enable your reps and get out of the way. Encourage them to fail forward, and don't try to save the day in every situation. Let your reps be the hero or the zero.

One of my favorite quotes is *"I never lose, either I win or I learn a lesson."* It's important that leaders have the perspective that every loss is an opportunity to improve and iterate.

When we have this attitude during role-plays, real life at-bats, 1:1s, [group check-ins](#), and enablement sessions, we will produce rockstar employees that can succeed in a variety of environments, which ultimately yields predictable and more positive results.



Want to make sure your organization doesn't flat-line? Implement a strong coaching strategy. Check out our library of plug-and-play [sales coaching templates](#) that will help you run more productive, metric-driven coaching sessions.

## Free Coaching Templates

Use one of our plug-and-play templates in your next 1:1 or group coaching session.

## 5. Strengthened alignment on messaging, goals, and techniques

Employees are often hired because they have characteristics or experience that are in line with company goals, expectations, and needs. What comes next is the modern problem of working cross-functionally. This is often where high-level strategy becomes fuzzy. Contradictory processes, personalities, and goals create friction, and an unsupported employee can quickly become frustrated and shut down.

Through intentional training, employees can learn some of the EQ skills required to navigate these fuzzy territories with increasing self-awareness and social awareness. Supported employees gain confidence to wade through rough waters and search for common ground. Supported employees can also detach themselves from their own outcomes and see other perspectives.

When a company is full of supported employees who are aligned on big-picture goals, they can accomplish impressive feats and go further together. Are you focused on improving cross-functional alignment? Maybe training around these soft skills is what you need in your organization.



# Choosing the Best Sales Training for Your Team

When I think about choosing a sales training program, there are a few factors that go into the equation. I approach this process in 3 steps: planning, execution, and measuring outcomes.

## 5 Questions to Ask When Planning for Your Next Training Program

Planning the right sales training program requires considering the current needs and gaps within the team. Here are some questions you should ask during this step:

- 1. What are the overarching business goals and objectives for the upcoming month, quarter, or year?
- 2. What do the frontline managers feel and see as regards status quo and current state?
- 3. What are reps interested in (personal development, quota attainment, exposure to new ideas)?
- 4. What have we already learned as a team in the past few months?
- 5. What are the experts saying on LinkedIn?  
(Some of our favorite follows here at Ambition are [Lauren Bailey](#) from [Factor 8](#) and [GirlsClub](#), [John Barrows](#) from [JB sales](#), [Becc Holland](#), and [Josh Braun](#)!)

Planning is just the beginning. Execution is where things get harder but also where you start to see the greatest rewards.

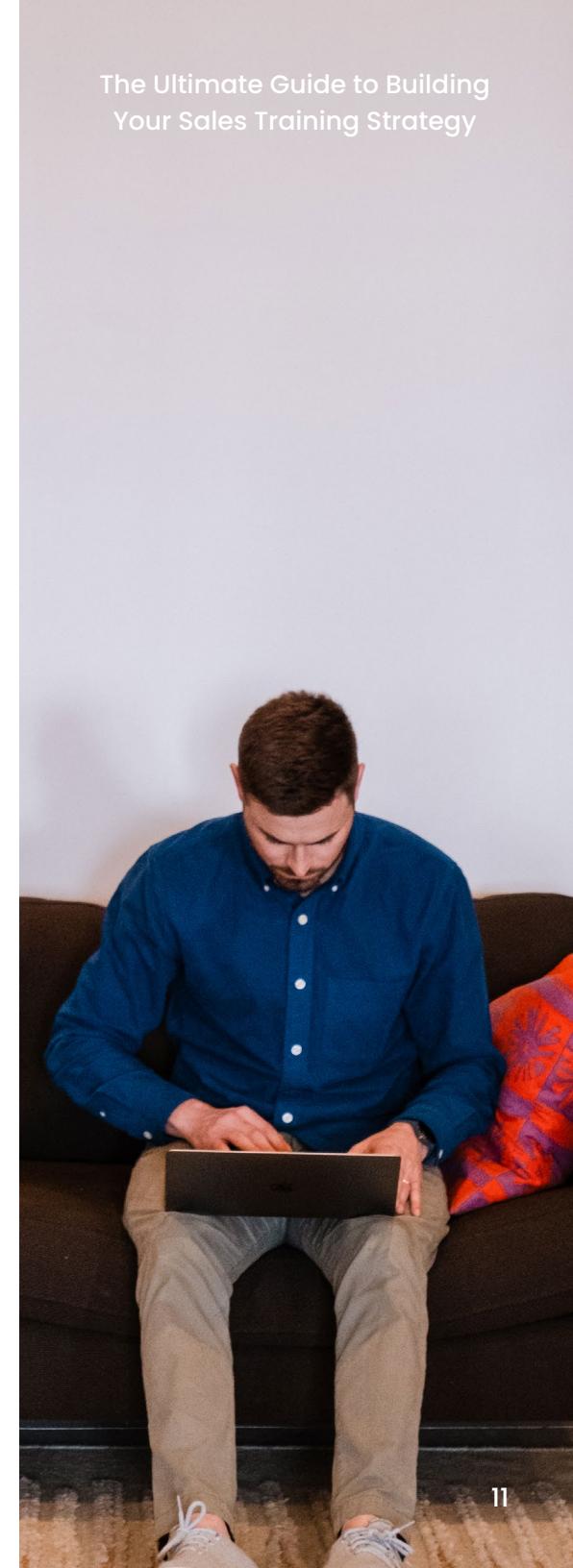
## How to Execute Your Training Program

After answering those 5 questions, survey your answers. What's the common denominator? What do people need to learn, and how do they learn best? Use that information to define a cohesive goal.

Employees need a compelling reason to care about the training. Will it affect their current comp, future comp, promotion path, soft skills, relationships at home, mental health, etc.?

**My Opinion:** *It's important to connect any company goal to the larger picture of an employee's life. Show that the goals align and there is a genuine connection between each person's purpose and the company's pursuit for revenue. (Contrary to popular belief, those two things are not typically at odds.)*

Next, I define the key takeaways that I want the team to remember, and then we reinforce that goal through different activities so everyone knows what they're working towards. Lastly, we test the outcome of our training programs to see how effective they are.



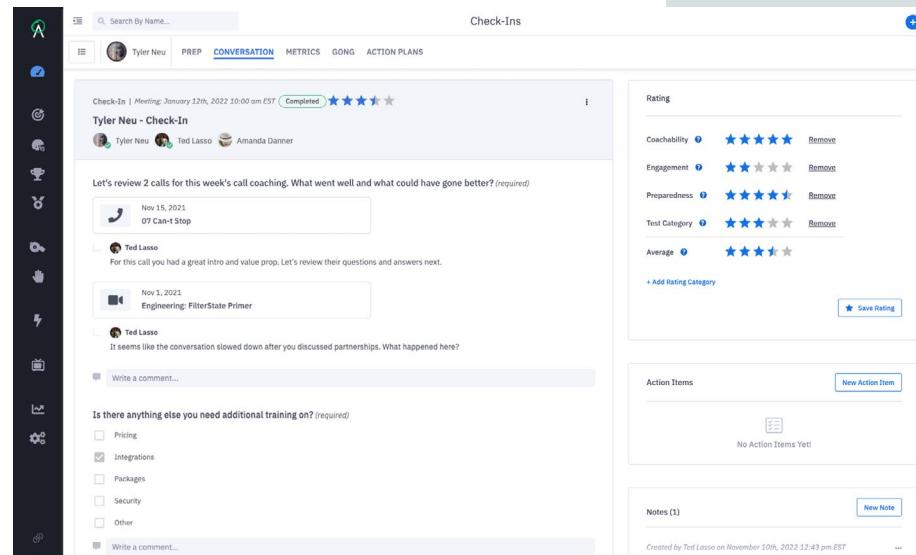
## 5 Ways to Measure the Outcome of Your Training Program

- *Google Survey*: Ask questions from the training and score answers
- *Google Survey*: Ask reps to self-report on their confidence with the material
- *Live Calls*: Use Gong, Outreach, or a similar tool to hear if the training has stuck
- *Role Plays*: Peer to peer, manager to rep, rep to employee outside of group
- *Create certifications or accolades*: Have reps complete a number of role plays and follow a rubric with requirements for completion

In addition, trainers and coaches can utilize the following ideas to keep the training momentum going. Here are some ideas for programs you can run on a weekly schedule or as one-off trainings:

- [Objection handling](#) workshops
- Selling techniques training
- Relationships and soft skill training
- Discovery process training
- Discovery role plays
- [Call camps](#)
- Audiobook group huddle
- Email trainings
- Product knowledge trainings and certifications

## Train Reps to Beat these 7 Common Objections



The screenshot shows a software interface for managing sales training and check-ins. The top navigation bar includes 'Check-Ins', 'PREP', 'CONVERSATION' (which is selected), 'METRICS', 'GONG', and 'ACTION PLANS'. The main area displays a 'Check-In' for a meeting on January 12th, 2022, at 10:00 am EST, which is marked as 'Completed'. The rating for this check-in is 4.5 stars. Below the rating, there are sections for 'Rating' (Coachability, Engagement, Preparedness, Test Category, Average, with 4.5 stars each) and 'Action Items' (a section for 'No Action Items Yet'). There are also sections for 'Notes' (1 note) and 'Comments' (a section for 'Write a comment...'). On the left side, there is a vertical sidebar with various icons, including a magnifying glass, a person, a gear, and a checkmark.

## CHAPTER 02

# 5 Signs of Disengaged Employees and How Your Training Programs Can Improve Morale

## The Real Reasons Your Employees Are Disengaged and How to Improve Morale

A sales leader's goal is not the number. Let that sink in.

A sales leader's goal is employee engagement. Because when this happens in an effective way, the number is going to follow.

This paradigm shift gets talked about often, but we rarely see it put into practice. One of my favorite sales influencers, [Lauren Bailey](#), is such a great evangelist of this philosophy. At [PEAK '22](#), Ambition's recent sales summit, Lauren talked at length about what a disservice we are doing to the sales profession when we make it **only** about the number.

According to Harvard Business Review, 75% of people in sales fail. And they normally fail within the first 14 months. A lot of blame for this is placed on their direct manager (sometimes warranted), but 60% of sales managers will also fail within their first 2 years. We can't exclusively blame the manager. We have a bigger problem on our hands. And it points back to our oversight in focusing more on the numbers than on our people.



So where have we fallen short when it comes to creating positive sales cultures? In this chapter, I'll identify 5 key signs of disengaged employees, the root causes of employee disengagement, and how we as sales leaders can start improving morale and increasing engagement.

## 5 Signs of Disengaged Employees

Before we can address the solution to our problem, we have to understand what disengaged employees look like. Here are some of the trademark signs and behaviors that indicate poor morale or low engagement:

### 1. Decrease in productivity/performance

This is an early sign that someone on your team is beginning to disengage. There's nothing wrong with a drop in performance every now and then, but when a rep's lack of consistency in activity and performance becomes a trend, you know you have an issue.

### 2. Withdrawal or lack of participation

Have you noticed less or decreased engagement on Zoom calls or in Slack? Does a rep give short answers to questions during 1:1s? Are they collaborating less or only passively participating in team coaching or [competitions](#)?

### 3. Lack of communication

Does a rep miss a meeting without letting you know? Have they failed to follow up on a project or activity they've been assigned?

## 4. Decreased or little interest in development or challenge

When you push for a rep's growth and development, do they respond apathetically or appear disinterested?

## 5. Break in routine

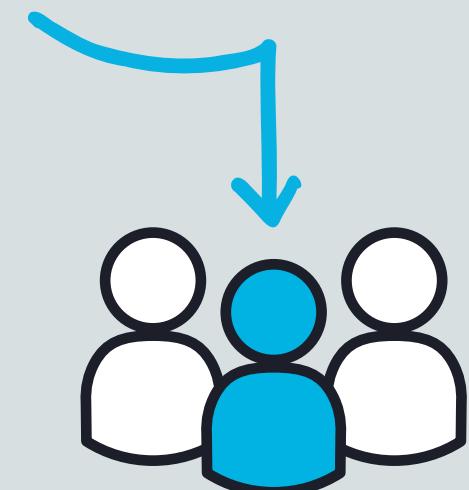
Have you noticed sudden changes to a rep's working schedule or behaviors? Are they absent online during regular work hours or coming into the office less frequently?

# Root Causes of Employee Disengagement

Now you know what behaviors to be on the lookout for—but what's really at the heart of someone's lack of engagement? Here are some of the core issues that leave employees feeling disengaged.

## 1. Their perception is that you care more about their contributions than you do about them

We send signals every day about the things we care about. In your 1:1 coaching sessions, do you express any interest in how a rep is doing outside of work, or are you just asking them when the next deal is coming in?



**1 in 3**

**employees** don't think company leaders have their best *interests* at heart.

Accenture Future of Work Study  
2021

## 2. They don't feel impactful to the business

Employees need to know they have a purpose and impact at your company. One of the most important things a leader can do is to make sure they remind their people of their value and impact often.

## 3. They aren't being coached or developed

If you don't invest in coaching or development plans for your people, they will have a very pessimistic view of their future with the business. More than money and other perks, your people want to be developed. If you aren't giving it to them, they will find another place to get it.

## 4. They don't know where they stand

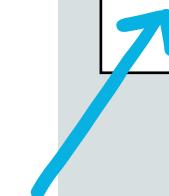
This one may come as a surprise. Because sales is such a numbers-driven profession, it seems like everyone would see their numbers and have a general idea of where they stand. But we need to give our people very clear expectations of what "good" looks like and be candid with them about the full picture of their performance.

## 5. They don't feel recognized

Sales leaders are busy, and [employee recognition](#) is one of the first things to fall off their radar when the calendar gets full. Sure, we celebrate the big six-figure deal that comes through, but are we shining a light on the small wins or the behaviors we want to promote amongst the team? And are we getting to know how each employee prefers to be recognized? I've shouted out team members before in a large group setting and they were mortified. Sometimes a personal email or Slack message acknowledging a win can go just as far.

Monthly  
1:1 Coaching  
Benchmark

2-4 sessions  
(weekly or bi-weekly)



## 4 Ways to Start Improving Morale

What now? We understand the signs and root causes of disengaged employees. How do we start driving better engagement amongst our teams? A huge piece of this is ensuring your people are well equipped and coached to actually succeed in their roles. Here are 4 ways you, as a sales leader, coach, or manager, can begin to invest more intentionally in the people on your team.

### 1. Build development plans

As mentioned previously, when we don't create development plans for people, we send the message that there is no future for those employees. But development plans don't necessarily need to path people to another role. They can outline steps to development within their current role or create a path to some micro-promotions.

### 2. Build enablement plans

**Research shows** that what young sellers want most from their jobs is to learn, which is why ongoing training and coaching is so important. When this happens regularly, reps are likely becoming more effective in their role—and when they feel confident and see their efforts succeed, they will be much more engaged.



**of employees**  
*say they'd stay  
at a company  
longer if it invested  
in their growth.*

LinkedIn's 2022 Workplace  
Learning Report

### 3. Be a better leader

This might sound blunt, but the [stats on employee retention](#) don't lie. The biggest factor on whether an employee stays with or leaves a company is based on their direct manager. If we aren't continually striving to be the best possible leaders, we might be the cause of a lot of the disengagement.

### 4. Make work fun

We spend the majority of our time at work. If we aren't occasionally thinking about how we can make it a bit more enjoyable, we are doing our people (and ourselves) a disservice. Fun certainly is not the main goal, but it can be a successful way to drive performance and engagement simultaneously. Look for opportunities to [create contests](#), put rewards and incentives behind certain milestones, or even just carve out time to catch up on non-work related items with your people. This can go a long way in improving your team's engagement.

[Check out our template gallery for competition ideas and contests that will help you drive engagement and create a culture of recognition.](#)

Remember: numbers are important, but numbers aren't everything. When you put your people first and focus on keeping them engaged through training, development, [motivation](#), and simply establishing good rapport, you'll create a culture that retains top performers, and the numbers will take care of themselves.



**of salespeople**  
*say their direct manager has the most influence on their success.*

*Forrester*



### Sales Contest Templates

Need to get your team hyped up?  
Improve engagement and increase productivity with a sales competition.

## CHAPTER 03

# How Employee Goals Inform Your Training Strategy

## How to Set, Measure, and Recognize Employee Goals that Impact Your Bottom Line

In sales, goals are our north star. They're what we work towards all day, all week, all quarter, and all year. Ensuring that you set accurate goals, measure progress against them, and *celebrate* goal achievement have an extremely positive impact on your organization beyond just driving more revenue. When given the right motivation, reps become more engaged and aligned with their manager and overall company goals, and they begin to take ownership of their performance and hold themselves *accountable*.

## Performance Goals, Development Goals, and Training Programs

So, how do we create goals that drive the right type of behavior in our teams? You'll want to ensure you're starting with the SMART framework when setting employee goals. Each goal should be specific, measurable, achievable, relevant, and time bound.

- **Specific:** In order for a goal to be effective, and to ensure it accomplishes the right thing, it needs to be specific. What initiative or program do you want to impact, and how?
- **Measurable:** Quantifying your goal makes it easier to track progress, hold yourself accountable, and know when you've actually accomplished it. By what percentage do you want to increase X, Y, or Z goal?
- **Achievable:** It may sound obvious, but goals need to be attainable. Otherwise, we run the risk of hurting morale and making reps feel as though they can't win. When defining goals, make sure you identify how reps can plan to achieve them. What activities will they complete in order to hit that goal?
- **Relevant:** It's important to think about the bigger picture when setting goals and ensure employee goals are aligned to broader company goals and initiatives. Each goal should strategically support those larger initiatives.
- **Time Bound:** To properly measure success, you and your team need to be on the same page about when a goal should be reached. What is the time frame in which you want to achieve your goal?

Setting SMART goals is the best way to ensure that goals are realistic and motivating, vs. overwhelming and unattainable.

Additionally, you want to make sure you have a healthy mix of **performance goals** and **development goals**.

# SMART Goals

- S** *Specific*
- M** *Measurable*
- A** *Achievable*
- R** *Relevant*
- T** *Time bound*



Performance goals are exactly what they sound like: a target level of performance expressed as a tangible, measurable objective against which actual achievement can be compared. An example of a performance goal might be to close X number of deals or set X number of meetings by a specific date. You may already be tracking [sales performance metrics](#) such as total revenue, average revenue per customer, average deal size, and pipeline. Use what you're already tracking to identify areas for improvement and build performance goals around them.

Development goals are objectives you set to improve your skills or capabilities. Setting these goals involves an introspective look at yourself or your team, and identifying the areas in which you can improve. For a rep, this might look like a goal of developing their negotiation skills, or learning about a new role they might be interested in. This is a great opportunity for sales and enablement leaders to collaborate on potential [training and development programs](#).

## 3 Ways to Track and Measure Employee Goals

### 1. Scorecards

Once your goals are set, it's important to keep those goals and your progress towards them visible. When reps have visibility into how they and their team are performing, they'll know exactly where they need to focus their efforts. Additionally, managers will be able to spot issues early and see where reps need more training or coaching. Ambition's [rep and team scorecards](#) are a perfect way to track progress toward goals, see results, and keep them top of mind for reps and managers alike.

[Calculate weekly activities and objectives that will pace your team to goal with our free scorecard templates](#)

### Scorecard Templates

Set, track, and measure the right weekly activities to pace your team to goal with our free scorecard templates.

## 2. 1:1 Coaching and Check-ins

Use 1:1 check-ins or regular coaching sessions as a touchpoint to align on goals and goal progress with your teams. Prior to a 1:1, managers and coaches should ask reps to report on their goal performance and progress. How are they tracking toward goals? Are they facing specific issues or challenges that prevent them from progressing? Find out how you can remove roadblocks to help clear the path for their success, and then document a go-forward plan with action items for follow up.

## 3. Group Coaching and Training

Group check-ins and training sessions are another opportunity to get a pulse on goal progress. In a group setting, reps can share challenges with their peers, offer insight or creative ideas to one another, and problem solve together. Additionally, everyone has the chance to celebrate real-time wins or milestones toward goal progress.

Group Check-ins > SDR - Friday Call Camp > SDR - Friday Call Camp - 9/16

We meet weekly to listen to SDR call calls that are either exceptional or have a good coaching lesson within.

Meeting: Friday, September 16th, 2022 1:00 pm EDT Completed: Saturday, September 17th, 2022 1:03 pm EDT

Agenda

Call Camp Recordings

On a weekly basis, we will update the agenda with the call recordings for the week. You will also vote for your favorite within this group check-in!

Link to the Voting (9/16/22) - <https://ambition.slack.com/archives/125361690124627493849099>

Brian Liebel 14 days Ago 1 min  
Meeting: Friday, September 16th, 2022 1:00 pm EDT Completed: Saturday, September 17th, 2022 1:03 pm EDT

Marlee - <https://exp.ambition.com/2010-04-01/Accounts/AC0b502d0b76be4dc4fc040ebe40f20/Recordings/REJ4125c15a776d464fd0fe082a702e406>  
Bob - <https://exp.ambition.com/2010-04-01/Accounts/AC0b502d0b76be4dc4fc040ebe40f20/Recordings/REJ4125c15a776d464fd0fe082a702e406>  
Max - <https://exp.ambition.com/2010-04-01/Accounts/AC0b502d0b76be4dc4fc040ebe40f20/Recordings/REJ4125c15a776d464fd0fe082a702e406>  
Max Heckley - 1 hour Ago  
Great session from the squad! Game formats/objection handling

Action Items (2)

Brian Liebel 13 days Ago 53 Quick tips training led by Max on handling "send me some more info" Created by Brian Liebel on September 16th, 2022 22:32 pm EDT

Calie Allen 13 days Ago Review 5 calls dispositioned "Call - Connected: Not Interested" and identify crucial/objection + summarize the best objection response. Created by Calie Allen on September 16th, 2022 22:34 pm EDT

Notes (4)

Created by Brian Liebel on September 17th, 2022 2:23 pm EDT

AMBITION Call Camp 9/9/22

Marlee 13 days Ago 1 min  
Meeting: Friday, September 16th, 2022 1:00 pm EDT Completed: Saturday, September 17th, 2022 2:23 pm EDT

Brian Liebel 13 days Ago 1 min  
Meeting: Friday, September 16th, 2022 1:00 pm EDT Completed: Saturday, September 17th, 2022 2:23 pm EDT

Max Heckley 13 days Ago 1 min  
Great session from the squad! Game formats/objection handling

Check-In | September 30th, 2022 8:00 pm EDT Completed ★★★★☆

Ross O'Neal - Quarterly Performance Review | Account Managers - West - Check-In

Program: Quarterly Performance Review | Account Managers - West | Ross O'Neal Maritza Diaz Ashley Bahrami

How do you think you're doing? (required)  
Honestly, I always feel behind in some way. It always feels like one step forward two steps back.

What are you most proud of since your last performance review (or since you started your role)? (required)  
Completing the management training program!

Where do you see room for improvement? (required)  
I'm good at starting projects but need to execute and finish more things.

[ADVICE FOR ME]: What can I do or stop doing that would make me more successful?  
I need more feedback, even if it's harsh. The more I know the more I can grow.

[DEVELOPMENT]: What is your dream job here? Why? (required)  
I would love to explore sales operations, being able to streamline processes.

[DEVELOPMENT]: What are your professional goals? What do you want to accomplish in the next 6 months?  
I'd like to become certified with Salesforce, I think that will open a lot of opportunities for me.

[DEVELOPMENT]: What's keeping you from achieving these goals?  
I don't know what I don't know. I think I need a mentor? I'm not sure what I'm missing.

**Rating**

Coachability ★★★★☆

Engagement ★★★★☆

Preparedness ★★★★★

Average ★★★★☆

**Action Items (1)**

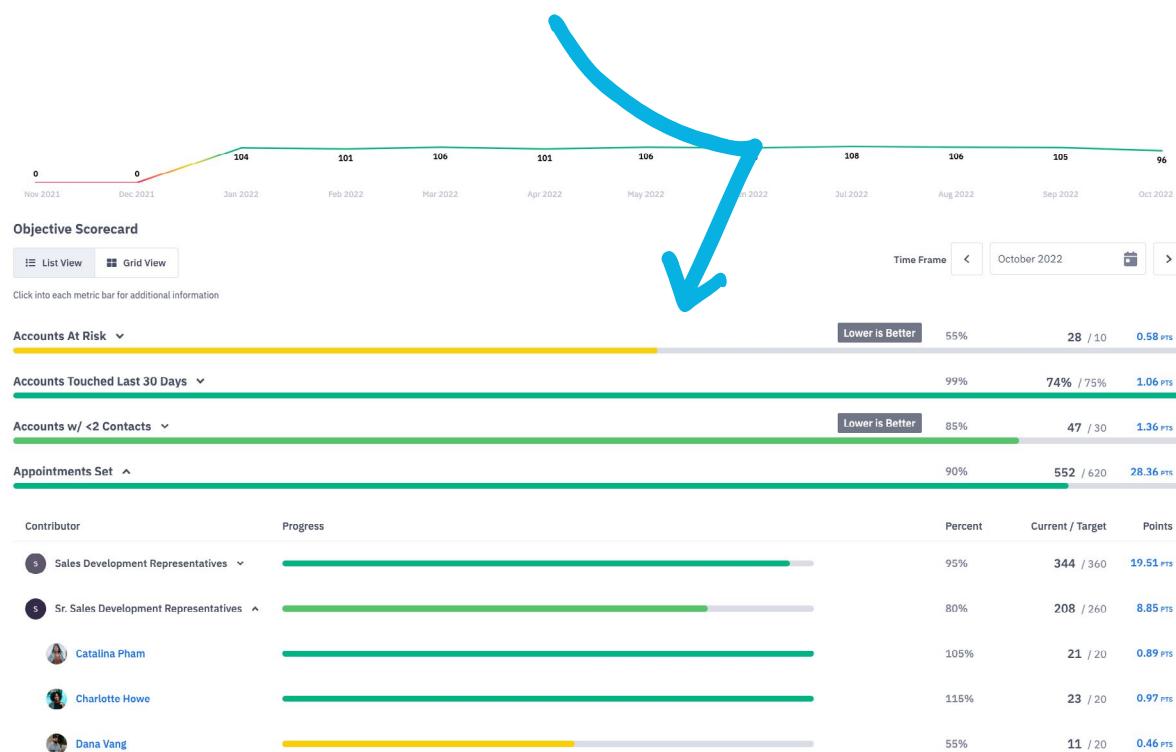
Ross O'Neal 1 min  
Block 30 minutes on my calendar to review my QHR progress  
Created by Maritza Diaz on October 3rd, 2022 2:23 pm EDT

**Notes (1)**

Maritza Diaz 13 days Ago 1 min  
Created by Maritza Diaz on October 3rd, 2022 2:23 pm EDT  
I spoke directly about under-performance and my concerns regarding effort.

# Identify Training Opportunities Based on Goal Performance

Goal setting isn't just beneficial to leaders and reps—it provides necessary insight to enablement teams. Based on goal performance quarter over quarter, enablement leaders can use trends to determine where larger training or coaching opportunities may exist. Additionally, if enablement is able to stay close to goal tracking within a goal cycle, it's also important to be nimble and flexible throughout that cycle to ensure we support reps in goal development and achievement. Just-in-time training and coaching is made possible by tools like [Ambition scorecards](#), which give enablement the visibility they need in order to identify areas of opportunity.



## CHAPTER 04

# 7 Enablement Training Programs to Help You Hit Your 2023 Sales Goals

## Your Guide to Setting and Achieving Sales Goals

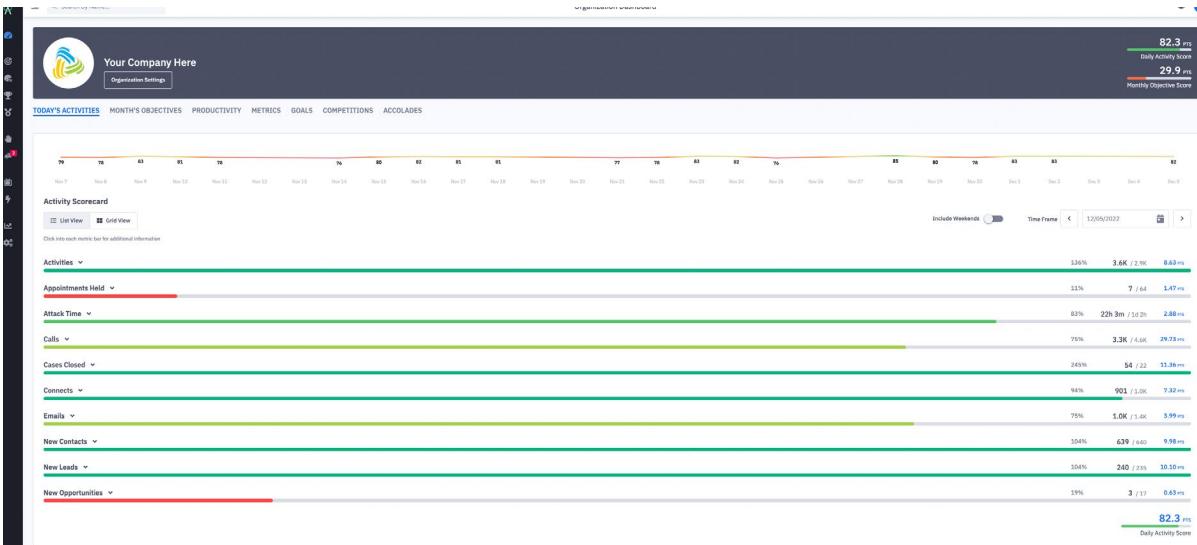
Let's face it, it's tough to hit sales goals right now. It doesn't matter if you are an SDR team working to build top-of-funnel pipeline, an AE team working to book net-new revenue, or customer success teams fighting to keep and grow your current customer base—we are all working extra hard in a tough economic environment.

Make sure your goals are specific, measurable, attainable, relevant, and time bound. With these components, you can set clear expectations with your team and [build reporting](#) that shows you whether your team is on track.

Ultimately, every organization is working to achieve a revenue target. Sometimes this goal can feel huge and out of reach, so in my experience, it's best to take your big revenue goal and break it down into metrics you can directly control. First, look at your historical performance and figure out which activities lead to revenue and based on your conversion rates, how many of those activities are needed each day/week/month in order to achieve your revenue goal. Examples could be number of emails/phone calls/touches, number of new sequences started in your sales engagement tool, number of new meetings set, number of demos performed, number of proposals sent, number of new logos won, number of accounts renewed, etc.

## Sales Report Templates

Get out of spreadsheets and present more engaging sales reports with our free templates.

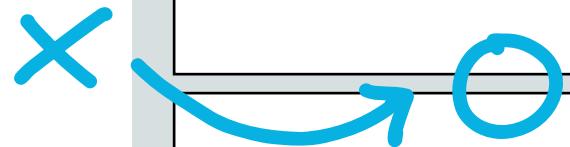


Once you know your team is driving the right number of activities, you must start to look at the quality of those activities. Examples could be: conversion rates by activity and deal stage, average deal size, and churn rate. It is important to note that if you are not achieving the quality metric goals then you will need to drive more activity to make up the difference.

Finding the balance between quantity and quality of activities is the key to success. Ensure you are consistently measuring both components in your goal setting process.

## Quantitative Metrics to Track Goal Progress

- Calls, emails, and touch points
- Meetings set
- Demos



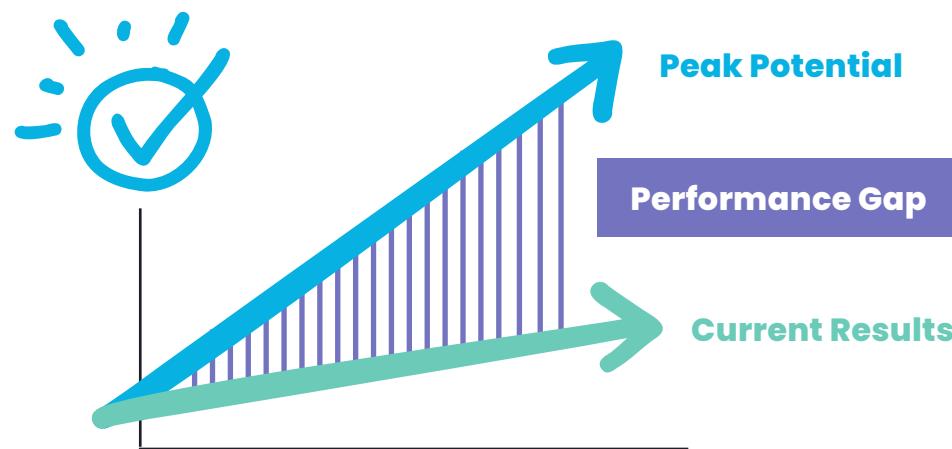
## Qualitative Metrics to Track Goal Performance

- Deal stage conversion rates
- Average deal size
- Churn rate

# 6 Components of an Effective Enablement Training Program that Will Help You Hit Your Sales Goals

So what if you get behind? One of the best avenues to increase performance is to drive an effective sales enablement training program.

First, it is important to understand what behavior you need to improve. Consistently analyzing performance vs. goals and proactively developing programs to close the gap requires tight alignment between the sales leadership team and enablement. Training alone will not fix the problem. Training with consistent follow-up and *coaching* by sales managers produces the best results.



## How do you build and structure an effective enablement training program?

1. Identify the performance gaps by regularly reviewing sales team KPI performance.
2. Once gaps are identified, identify the root cause behavior that needs to change.
3. Sales leaders should collaborate with the enablement team to build a [\*training program\*](#).
4. After the training is completed, sales leaders should incorporate follow-up in team meetings and 1x1s to reinforce the implementation of concepts with customers and prospects.
5. Check knowledge retention and behavior change through a certification program.
6. Measure the results of the program. [\*Gamifying results\*](#) is a great way to drive visibility to program activity and achievement.

## 7 Gaps That Could be Causing a Revenue Miss and Training Program Ideas to Combat Them

### 1. Not enough qualified leads

**Potential behavior problem causing the miss:** discovery skills

**Program idea:** 3-Step Series on Discovery Skills

- Review ideal customer profile
- Effective questioning skills
- Active listening

## 2. Total pipeline below goal

**Potential behavior problem causing the miss:** low prospecting activity

**Program idea:** Book Club

- Pick out a book about prospecting best practices
- Challenge team to implement concepts from the book
- Submit call recording examples and share in team meetings
- Build a competition around activity metrics and new meetings set for reinforcement

## 3. Conversion rates are too low

**Potential behavior problem causing the miss:** overcoming objection skills

**Program idea:** Introduce Framework and Live Role-Play

- Have the team submit [common objections](#) they struggle to overcome
- Introduce an [objection resolution](#) framework
- Have the team crowd-source objection/resolution answers using the framework
- Practice with live role-plays where one person acts the like prospect/customer and the other acts as the sales representative

## Our Top Picks for Your Sales Training Book Club

- **[Fanatical Prospecting](#)**  
by Jeb Blount
- **[Getting to Yes](#)**  
by Roger Fisher, William Ury, and Bruce Patton
- **[How to Win Friends  
and Influence People](#)**  
by Dale Carnegie

## 4. Average deal sizes are too small

**Potential behavior problem causing the miss:** Poor negotiation skills

**Program idea:** Training on negotiation levers

- Review deal financial levers
- Provide real deal examples and ask reps to role-play a negotiation using the deal financial levers
- Certification: submit a negotiation call leveraging new skills

## 5. Deal cycles are too long

**Potential behavior problem causing the miss:** Inability to get to the decision-maker in the deal

**Program idea:** Mapping the buying process and building a MAP (mutual action plan)

- Review deal financial levers
- Provide real deal examples and ask reps to role-play a negotiation using the deal financial levers
- Certification: submit a negotiation call leveraging new skills

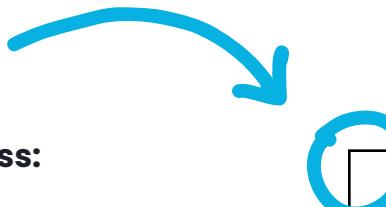
## 6. Customers are churning

### Potential behavior problem causing the miss:

Inability to show ROI

#### Program idea: Effective Quarterly Business Reviews

- Roll out a new Quarterly Business Review format focused on ROI
- Train the customer success team how to demonstrate customer ROI by leveraging platform data
- Have reps practice delivering the new format by conducting live role-play certifications in 1x1s with their leader or small peer groups



"Be sure to show proof points that you're solving the problems your customers originally came to you for. Quarterly ROI and accurate dollar calculations help customers justify spend and see long-term business impact."

**- Kelly Berg,**  
*VP of Customer Success, Ambition*

## 7. Customers are not expanding

### Potential behavior problem causing the miss:

Not positioning new product lines

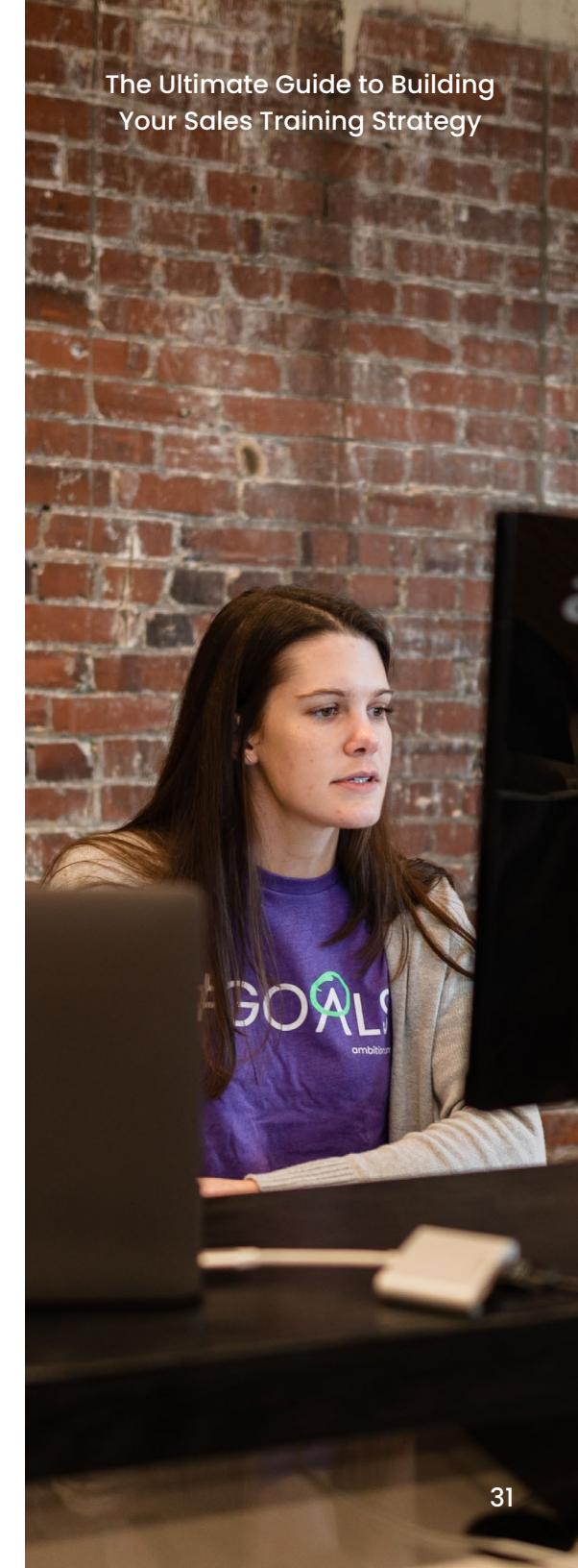
#### Program idea: Pitch/Demo Certification

- Conduct product training. If possible, include a "hands-on" portion so reps can truly understand the value the product provides
- Ensure reps can speak to the value by teaching effective storytelling techniques
- Ask sales leaders to identify calls where reps effectively positioned the new product line and use these to build a call library of best practices
- Measure new product attach rate and ensure these metrics are visible in team [dashboards](#) and [competitions](#)

# Sales Enablement Training Best Practices

There are clearly a lot of ways you can tackle performance gaps with effective sales enablement training programs. While the methods and tactics to train new behaviors can vary based on the needs of the business, there are some best practices that always ring true.

- Begin with the baseline of a standard sales process playbook. If you don't have that, start there.
- The playbook allows you to measure what is working and not working. If everyone uses a consistent process, you will be able to identify behavior gaps and how to address them by watching how the team performs to the sales goals.
- Training is an ongoing process, not a one-time event. It should start on day one of employment with effective new hire onboarding and should continue throughout the life of the employee with consistent skill development programs combined with sales leader coaching.
- When setting out to build a program, start by setting clear training goals. This [article](#) does a great job of outlining how to set effective training goals and the overall importance of sales training.
- Keep goals and performance visible. Establish reporting, communicate results, and when appropriate, [gamify it!](#)
- [Reward](#) progress and completion to [drive accountability](#) and reinforce a training culture.





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