

Your guide to onboarding sales reps with ease

Bring new reps into the fold quickly and set them up for success



Table of contents

Introduction	3
Give new reps the keys to institutional knowledge	4
Build a digital-first community with Slack channels	5
Create a white-glove onboarding experience with automation	6
Manage assignments with Slack workflows and clips	7
Let workflows do the heavy lifting for you	8
Integrate critical tools with Slack so reps can stay focused	9
Create a safe space for questions with peer-sourced channels	10



Introduction

Onboarding can make or break a new rep's experience. The best sales enablement and management teams will focus on building a sense of inclusion from day one. They'll point new reps to peers, tools and information in their first few weeks that will benefit them for years to come.

But onboarding can be an imperfect process. Each manager has their own approach, and reps have different preferences for how they digest information best. At Slack, we've uncovered a few tips and tricks to ensure everyone gets the essentials while also providing enough flexibility for reps to personalize their onboarding journey. Here's a look at how we do it.



Give new reps the keys to institutional knowledge

Slack search is your not-so-secret ally in the onboarding journey because, as any sales or onboarding manager knows, new reps have many questions. And they're not necessarily aware of where to direct those queries and how to find answers.

With Slack, which not-so-coincidentally stands for Searchable Log of All Communication and Knowledge, reps don't start at inbox zero. Team and account

channels provide a rich history of institutional knowledge, and Slack's **robust search feature** allows reps to home in on the specific information they need.

Within our own sales workspace, we have almost a decade's worth of institutional knowledge, so we spend a lot of time showing reps how to use search and apply filters to locate the answers to their questions. And who says onboarding can't be fun? To keep it light, we use a **digital escape room** to teach search techniques.

Filter By

Keywords
pitch deck for public sector]

From
Lisa Dawson

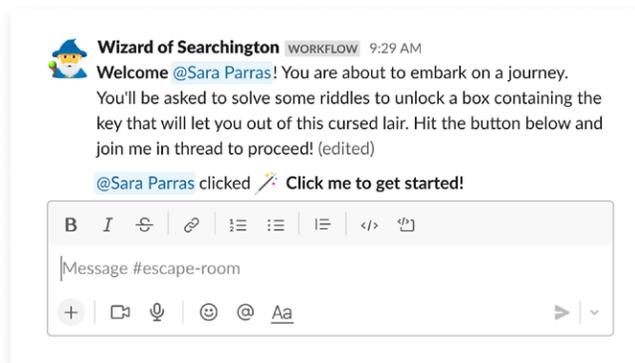
In
public-sector-industry-marketing-lab

With
ex. Lee Hao

Date
Last 12 months

Only include channels I'm in
 Exclude apps, bots and workflows

[Learn how to search in Slack](#) Cancel Search

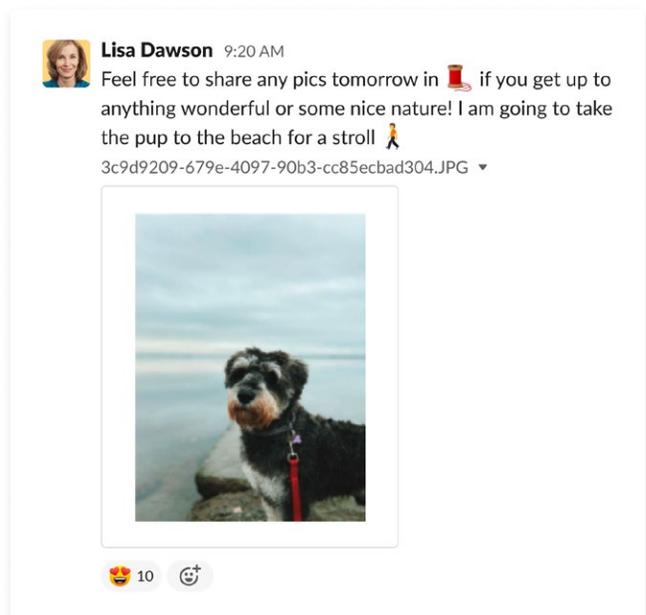


Build a digital-first community with Slack channels

Like many sales teams today, we're onboarding new hires remotely, which makes building a sense of community and creating shared experiences even more critical. At Slack, we start this process two or three weeks before new hires officially join by giving them access to a Welcome to Slack guest workspace. Here, they have a chance to explore Slack in a low-pressure environment and connect with other new hires from across the business, including engineering, marketing, product and more.

Once the big first day arrives, we then add them to an onboarding class channel. Within this shared digital space, we'll open with some icebreaker posts, such as "What's your favorite Giphy?" or "Post a picture of your pet" to get people talking and comfortable. The channel becomes a digital community as its members progress through the different stages of onboarding together.

Once reps have completed the general onboarding, they're added to a sales-specific onboarding channel for a four-week boot camp. Here, they can swap onboarding experiences and answer one another's questions. We also use [Donut](#), a Slack app that facilitates social connections, to randomly pair members of the channel and prompt them to schedule informal, get-to-know-you chats.



Create a white-glove onboarding experience with automation

Once a new hire's start date is confirmed, it's entered into Donut. This kicks off a workflow that sends the hiring manager a link to the onboarding experience and resources for supporting their new team member. Donut continues to trickle out updates to the hiring manager over the next few weeks, including reminders to schedule check-ins and a list of topics to cover during each one.

All new reps are also assigned a sales buddy. The buddy, generally a seasoned member of the new hire's team, receives prompts to schedule a series of one-on-ones as well as suggested questions to ask during these syncs.

By automating the entire process, we can ensure consistent touchpoints. The prompts give structure to the conversations but also allow managers and buddies the flexibility to respond in real time to their new hires' needs.

How to solve for video fatigue

Even virtual coffee syncs can start to feel like a chore after a long stretch of video calls. At Slack, we encourage new hires to try features that limit on-air time and allow for breaks.

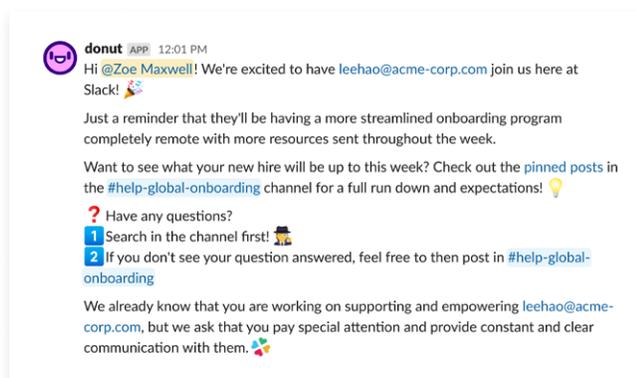
Want to give it a whirl? Here are a few easy options:



Clips: Ask new hires to record and submit assignments as **Slack clips**, an easy-to-use feature for capturing and sharing video or audio snippets. This allows them to complete the work at their leisure and seamlessly share it with teammates.



Huddles: Recommend that sales buddies skip the formal Zoom video call and try a **huddle** instead. This audio-only feature enables users to start an informal call within Slack, no filter required.

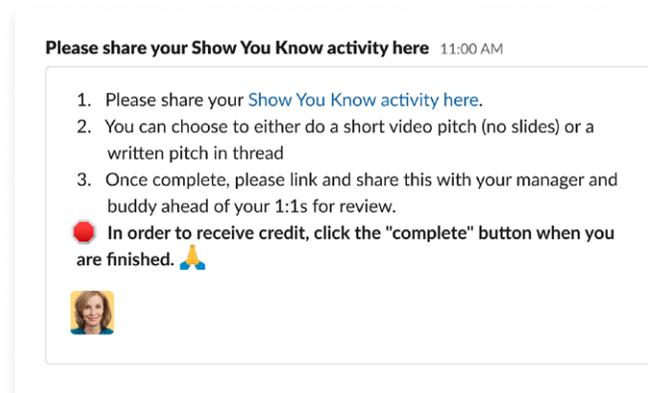


Manage assignments with Slack workflows and clips

During the sales bootcamp, reps cover a new set of learning objectives each week and complete an assignment to demonstrate mastery. To standardize assignment submissions, we use **Workflow Builder**, a no-code tool for automating routine processes. Reps simply fill out the workflow with the necessary information and submit their assignment. This not only reduces new rep questions, it also helps the enablement team and managers keep track of who's completed the work and who might need more time.

We also rely on **clips**, short video and audio recordings in Slack, for assignment submissions. For instance, if reps recently covered how to go to market against competitors, they might be asked to record and submit a competitive pitch. With clips, they can record the pitch right in Slack and seamlessly share it in-channel. This allows the rest of the onboarding cohort to watch and learn from one another. Managers can be swiftly looped in with a **mention** to review a rep's progress.

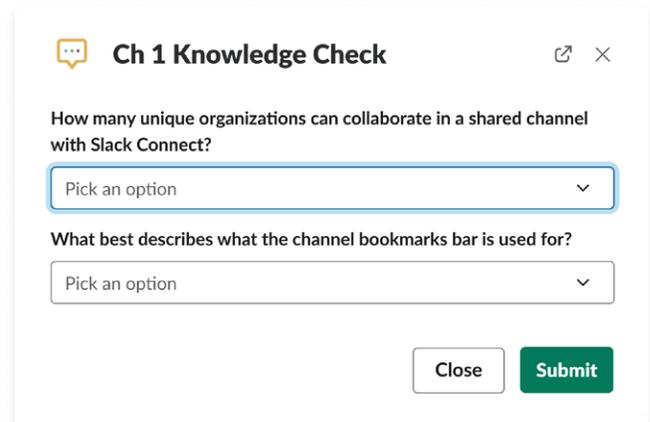
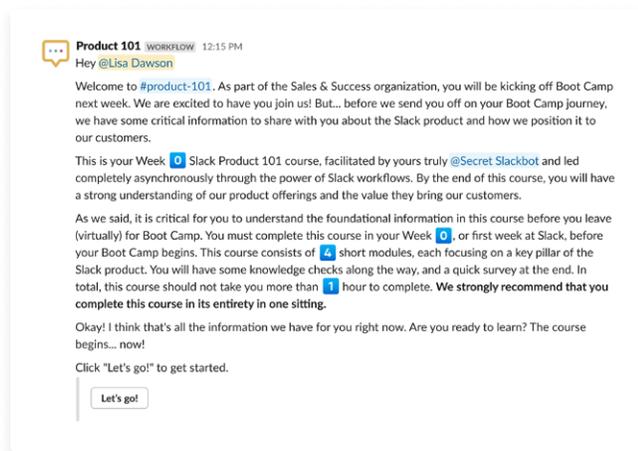
Clips and workflows not only make onboarding scalable and more convenient for new hires, they also ensure that hiring managers have full visibility into how their new reps are progressing and where they might need additional support.



Let workflows do the heavy lifting for you

To sell the product, our reps need to know the product—and exceptionally well at that. To ensure that all new hires have a solid product foundation from the start, we developed an interactive, self-paced Product 101 course in Workflow Builder.

By managing the content via workflow, reps can work through it at their own pace. They can review the material, apply their new knowledge and test their retention—all within the product itself, Slack.



New hires simply join the channel **#product-101** and kick off the workflow by adding an emoji reaction to the welcome message. The course consists of four short modules, each focusing on a key pillar of the Slack product. The sections are brought to life with clips and supplementary links. Each section also includes an in-Slack activity, such as setting reminders, and a knowledge check that includes questions about the material covered.

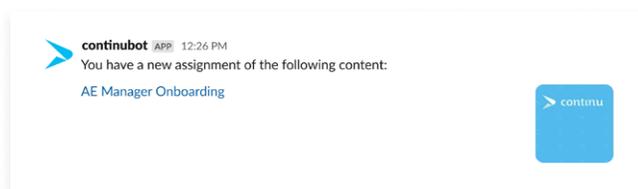


Integrate critical tools with Slack so reps can stay focused

Whenever possible, we integrate our most critical tools with Slack so reps can maintain focus and find answers where they're already working.

For instance, a new rep can use our integration with revenue intelligence platform Gong to set parameters for any recorded calls relevant to their line of business. When a call that meets their criteria is recorded, they'll receive a direct message in Slack with a link to the recording. By listening in, they can learn how to position the product and what language lands with prospects.

We also integrate our learning management system with Slack. The integration sends automated alerts to both new hires and their manager when trainings are assigned, due dates are approaching and anything is past due. This ensures reps are able to easily assess any to-dos and gives managers visibility into how their new hires are progressing.



Create a safe space for questions with peer-sourced channels

Sometimes questions crop up that don't have easy answers, even with a decade of deals at your fingertips. For those, we create a channel where reps can ask their peers for answers. Whether they have questions about fair billing or need help crafting a pitch for a prospect in the logistics industry, answers are generally just a post away.



Lisa Dawson 6:10 AM

@channel Hello wonderful new hires! Have a question and not sure whom to ask? Fear not! I have created an ask-me-anything channel and invited the wider Sales and Success EMEA team to join. Here you can ask a question using the 🟠🟡🟢 to indicate urgency and one of your friendly colleagues will answer. The channel is #emea-sales-new-hire-ama (make sure to bookmark it). Over time you can also search to see if the answer is already in channel. 🙌

The best part? The channel serves as a living archive. If the question has come up once, it's bound to come up again, and future new reps will be able to find it in Slack. Which brings us back to Slack search—that most critical of onboarding skills.



About Slack

Slack makes work simpler, more pleasant and more productive. It's a channel-based messaging platform for the enterprise that brings the right people, information and tools together to get work done.

From FTSE 100 companies to corner shops, millions of people around the world use Slack to connect their teams, unify their systems and drive their business forward.



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