

Needs Assessment Report: “SaaS Product” New Hire Training

OVERVIEW OF FINDINGS

- **What is the gap?**
 - At present, there is not a clearly defined structure or set of resources used to train new hires in the org on how to understand and apply the functionality of and use cases for “SaaS Product”.
 - This falls into the following three categories: knowledge, skills, and environmental gaps
- **Specific business impacts of the gap:**
 - The time new hires spend being taught “SaaS Product” could be allocated to role specific tasks and responsibilities. The extended training process uses more of our trainer’s and new hire’s time over a longer timeframe.
 - The majority of time a new hire spends learning “SaaS Product” is through situational/on the job experience rather than structured training and practice. This increases time to proficiency.
 - Lack of resources and guidelines on how to train a new hire on “SaaS Product” increases the load on Senior Sales Engineer (or Acct Manager in APAC) tasked with teaching new hires.
 - Sales Managers do not always accurately qualify prospects and it then becomes the SE’s responsibility during the demo phase.
 - The Company doesn’t create a space for new hires to build their confidence qualifying, using, or demo-ing “SaaS Product” in their first 60 days. This has long term effects on morale and role understanding.
- **If the gap were filled, what would be the business impact?**
 - Clearly defining responsibility during the onboarding process improves role understanding and increases job satisfaction.
 - New hire and Sales Engineer trainer will spend the time training on “SaaS Product” more effectively. This frees both the trainee and trainer’s time to be used, respectively, getting up to speed on their new role expectations and working deals.
 - Through effective and globally uniform product education, we enable sales to better qualify and disqualify prospects. This, in turn, decreases the need for SEs to qualify or disqualify in the demo stage.
 - Providing structured training materials with the adult brain in mind enhances the quality of the training and planned resources. This will decrease the amount of time a new hire will need to spend with SEs or product managers down the line due to lack of proper training.
 - SEs will spend less time creating and managing new hire “SaaS Product” training and more time on their role responsibilities.
- **Within the gap:**
 - **What are the knowledge gaps? (Sales, SE, ASM)**
 - The knowledge gap refers to understanding the competitive landscape, features, benefits, limitations, basic functionality of “SaaS Product”. The knowledge is applied when qualifying prospects, disqualifying prospects, and giving demos.
 - **What are the skills gaps? (SE, ASM)**
 - The skills gap refers to understanding how “SaaS Product” is being used by customers and how to implement “SaaS Product” as an effective solution. Skills are needed when demoing to prospects, training resellers, qualifying or disqualifying prospects in a demo as an SE, and onboarding new customers.

- These skills include: detailed product functionality, features, limitations, bugs, nuances, understanding what drives customer/prospect requests and questions.
- **What are the environmental gaps? (Sales, SE, ASM)**
 - The environmental gap refers specifically to the resources available for “SaaS Product” training. The Company doesn’t provide global, effective resources for a new hire to understand the market and software.
 - By not providing resources we may also be creating a motivational gap unnecessarily.

DATA COLLECTION KEY FINDINGS

- **Indicate what modes were used to gather information**
 - 1v1 Interviews
 - Group Interviews
- **1v1 Interviews:**
 - **Who did you have 1v1 interviews with?**
 - Solutions Architect
 - Sales Engineer EMEA
 - Sales Engineer LatAm
 - Sales Engineering Mgr EMEA
 - Sales Engineer Team Lead NorthAm
 - Director Customer Success NorthAm
 - **Email exchange with**
 - Sales Director LatAm
 - Director EMEA
 - **Key Findings from brief email exchange:**
 - Sales Managers do not play a role in training new sales hires.
 - John Doe provided some ideas as he passed me off to chat with Jim Doe. John’s input is in line with all of the findings below from Sales Engineering 1v1 interviews.
 - **The goal for individual interviews with Sales Engineers was the same.**
 - Understand what resources regional teams use train Sales/SE new hires to understand “SaaS Product”.
 - Understand the process regional teams use to train Sales/SE new hires on “SaaS Product”.
 - Understand who trains new Sales/SE on how to use “SaaS Product”.
 - Learn how hiring managers would ideally train their new Sales/SE on “SaaS Product”.
 - Determine how long a manager considers an appropriate amount of time for a Sales Engineer to have a proficient understanding of “SaaS Product”.
 - Differentiate between the knowledge a new Sales Manager needs and the knowledge a new Sales Engineer needs.
 - Differentiate between the skills a new Sales Manager needs and the skills a new Sales Engineer needs.
 - Gather frequently asked questions that customers ask in a demo.
 - **Key findings from Sales Engineer interviews:**
 - Senior Sales Engineers or experienced Sales Engineers (in APAC Senior/experienced ASMs) are the people who train new Sales/ASM/SEs on how to use “SaaS Product”.
 - In each region, team members who are responsible for training new hires have developed their own materials to assist in their training process. They are

responsible for maintaining said materials if they choose to keep using them as a training resource.

- Senior SEs in EMEAR are typically demo-ing “SaaS Product” in their first 4 weeks with The Company.
- Junior SEs are typically demo-ing “SaaS Product” in their first 8 weeks with The Company.
- Across regions it’s expected that Sales Engineers should be proficient and providing well-structured demos to customers no later than 12 weeks with The Company.
- The resources currently widely available in Highspot, The Company.com, and the help website are not enough for training a new Sales/ASM/SE on “SaaS Product” because they are only showing how to execute a command.
- Sales does not need an in depth understanding of how to use “SaaS Product”. Their focus on the product is understanding the functionality enough to know how to qualify/disqualify prospects, the gigabyte model, pricing, licensing, and customer objections.
- More use case information is desired globally. This does not mean ‘success stories’; SEs want to know how the customer expects to use the platform.
- Key reaction from SMEs: excitement about having a structured training plan for new hires that will provide all necessary foundational product information in one place.
- **Goals for interview with Director Customer Success NorthAm:**
 - Understand the differences in how an Acct Manager interacts with the platform versus a SE.
 - Will a nAcct Manager benefit from the content created for Sales and SE, or will ASMs need their own training material?
- **Key findings from interview with Director Customer Success NorthAm:**
 - The knowledge an Acct Manager needs to have about “SaaS Product” is just shy of what we expect a Sales Engineer to understand. This includes features, functionality, and understanding how pieces of a ‘custom’ solution fit together to support customers post-sale.
 - ASMs will benefit from the training material created for a Sales Engineer and do not need their own set of content created to train on “SaaS Product”.
- **If group interviews:**
 - **What groups did you talk to?**
 - Acct Manager APAC + Sr Mgr Sales Engineering APAC
 - Understand what resources regional teams use train Sales/SE new hires to understand “SaaS Product”.
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 - Determine how long a manager considers an appropriate amount of time for a Sales Engineer to have a proficient understanding of “SaaS Product”.
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 - Gather frequently asked questions that customers ask in a demo.
 - Customer Success Mgr NorthAm + “SaaS Product” Product Manager Defense + “SaaS Product” Product Manager Commercial

- Understand the conversations product managers currently have when discussing “SaaS Product” with new hires in their ‘training’ conversation
- Identify what resources product managers rely on to train on “SaaS Product”
- Get buy in from product managers as SMEs
- **Key Findings**
 - The key findings are in line with the key findings from my 1v1 interviews with Sales Engineers.
 - About half of “SaaS Product” revenue comes from the API, and those customers never enter the “SaaS Product” platform.
 - There are very limited resources for API training, and it’s hard to train on unless you have an API connection set up.
 - Peter will schedule 2-3 sessions to train someone on the platform and includes plenty of time for hands on practice.
 - He utilizes the pitch deck and usage guide
 - Prior to training on how to use the product, they first make sure people understand the product’s relevance and value.

KEY FINDINGS

- **Between all of the methods that were used to collect data:**
 - **What are the key findings that need to be addressed?**
 - Key product details or ‘bugs’ that are critical to understanding the functionality of the platform are not documented anywhere; tribal knowledge of product nuances are passed from person to person.
 - Training for new reps is varied per region including discrepancy in resources used, methodology used, and time spent.
 - SE needs to know every detail of the platform’s functionality, how it solves customer problems, and how customers use the platform.
 - Sales needs to know basic functionality of the platform, pricing, licensing, and the gigabyte model.
 - Acct Manager need to know detailed functionality of the program, pricing, licensing, the gigabyte model, and how customers use the platform.
 - Sales Engineers are tasked with training new Sales/SE/ASM and have developed their own materials to use as training resources.
 - ~None of the resources currently available in Highspot are utilized for new hire training on the platform by SEs.
 - The current companywide materials demonstrate how to use the platform, but not how customers are using it.
 - **How do they affect the business?**
 - The lack of uniform and consistent training on this product furthers the divide between regions.
 - Regionally (and within teams in each region) there are varying resources and methods used to train new hires on “SaaS Product”. Because of varying best practices around the globe there is a lack of structure and knowledge sharing that furthers the divide.
 - The lack of uniform and consistent training on this product leads to decreased role clarity.
 - As reflected in the Q1 2021 Glint survey, role clarity is trending down at The Company as a whole. By not providing training materials specific to each role, we aren’t setting our new hires up for success.

- This can lead to motivation gaps if left unattended, if employees feel unsupported and confused.
 - Because of the lack of documentation, if a Sales Engineer does not inform a new hire of the known bugs/nuances in the platform, there is no way for the new hire to find that information on their own. This can lead to a few things 1. the new hire spends time trying to find a solution without knowing best practices 2. the new hire is caught in a customer demo not knowing the answer to a question which erodes their confidence in themselves, and potentially a customer's confidence in The Company. This is especially difficult for remote workers and wastes time and resources.
 - Sales managers may not know how to accurately qualify/disqualify a prospect because they do not understand the functionality and limitations of "SaaS Product".
 - Employees have a hard time learning "SaaS Product" without the time and effort of a senior level SE. This time would be more valuable spent streamlined to increase time solving customer problems and closing deals.
- **How will addressing them affect the business?**
- By providing structured training materials with input from each region we will begin to break down silos between our regional teams.
 - By providing structured training materials with role specific information defined, we will provide role clarity regarding using the platform which drives overall job satisfaction.
 - By providing structured training materials, there will be uniform resources available to all regions that cover the necessary topics and decrease time to proficiency.
 - Decrease the time and effort spent by peer/senior SEs on creating and conducting new hire "SaaS Product" training.
 - New Sales Managers will build confidence in understanding use cases and functionality; this will lead to them better qualifying/disqualifying opportunities and SEs will spend less time on demos disqualifying prospects.
 - New SEs will build confidence and competence in demo-ing, which will lead to decreased time to proficiency and likely more deals closed.

RECOMMENDATIONS

- **What is the recommended solution to address the key findings?**
 - Create a standardized training course in the form of PowerPoint decks to be used by regional teams. The content required across regions is similar enough that a separate deck for each region will not be necessary. Team members responsible for training a new hire will be able to discern which information is relevant and necessary for their new teammate and can remove or skip unnecessary sections.
 - "SaaS Product" 101 - Sales, ASM, SE
 - Satellite imagery foundations
 - This can be utilized if a new hire does not have extensive geospatial knowledge.
 - Business model
 - Pricing, access, gigabyte model, seats, licensing, etc
 - Product Information
 - Basic instructional information spelled out that can be referenced in the help site later.
 - Using the carousel, downloading imagery, etc
 - Features and limitations

- Unconscious Incompetence. By bringing the procedural for key functionality to the forefront we are giving new hires a frame of reference to build off of.
 - Use cases
 - The relevance of use cases will be based on region and role specific focus.
 - Tie in compete information
 - Aids in better qualifying/disqualifying prospects
 - Competitive landscape and competitive advantage
 - Practical practice scenarios
 - Executing a simple command
 - Password change, switching between account layers, accessing customer usage information
 - “SaaS Product” 201 - SE, ASM
 - Use cases
 - The relevance of use cases will be based on region and role specific focus.
 - Deeper dive into use case information from 101 deck.
 - Learn to anticipate why a customer may ask a certain question.
 - Learn the questions to ask in a demo to understand what a customer needs but might not be able to communicate
 - Practical practice scenarios
 - FAQ in a demo or from a prospect
 - Executing a complex, multi-step command
 - Bugs/nuances and how to work around them
 - Product information
 - Bugs/nuances of “SaaS Product”
 - Deeper dive into product functionality, features, limitations
 - New hire will have a peer mentor on their team for “SaaS Product” training.
 - Demo ‘check in’ practice through Zoom with peers in their first 2, 4, 6 weeks where new hires will practice and get direct feedback. Spaced learning increases memory retrieval strength.
 - In depth for Sales Engineer (functionality and technical)
 - Surface level for Sales (using it to tell a story)
 - Self-paced practice activities and demo practice outside of formal demo training with a experienced employee and/or mentor in the first 2, 4, 6 weeks.
 - Call shadowing and debrief with experienced peers.
 - Questions to experienced peer from new hire
 - Senior level explaining why they did, said, asked, or showed certain things
- **How will this recommendation fill all gaps identified?**
 - Creating materials fills the environmental gap.
 - We will be providing resources that were previously nonexistent and reducing the barrier to entry.
 - Demo practice with accountability fills the skills gap.
 - Through spaced practice their retrieval strength will increase.
 - Standard deck fills the knowledge gap.
 - Providing details on the market, use cases, pricing, and software
- **How will this specific solution affect the business?**
 - This solution will be the first of its kind. It will not only enhance the onboarding experience for new hires, but it will also show our global team that we are serious about maximizing performance and begin to set a standard of accountability.

- It will provide new hires a safe space to learn (other than on the job experience), fail, ask questions, and experiment which is crucial for improving learning transfer.
 - Thus, decreasing time to proficiency and increasing confidence and morale safely.
- Extended engagement from a senior team member in a 'mentor' capacity: assigning a mentor increases likelihood of producing a high-performing team and long-term success.
- Focusing on role clarity will increase efficiency during the sales cycle. By clearly delineating which team is responsible for which action (ie: sales should be qualifying/disqualifying, Sales Engineer demos functionality, Acct Manager is post sale support), we will decrease frustration and time wasted. This will help prevent motivation gaps.
- Call shadowing coupled with call debriefs will increase the speed at which new hires are proficient in front of customers. Shadowing multiple peers provides new hires the opportunity to a) connect with their teammates b) experience customer objections and how they are handled c) compare and contrast how their peers demo/interact with "SaaS Product" to ultimately help decide what works best for them