Creating a Functional Onboarding Process for Company X’s Sales Personnel

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Master’s Thesis
Degree Programme in
International Business
Management
2018

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Abstract

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Degree programme
Master of International Business Management

Report/thesis title	**Number of pages and appendix pages**
Creating a Functional Onboarding Process for Company X's Sales Personnel	**67+ 15**

Onboarding is a key strategic element for the company. Onboarding is the first phase after the recruitment when the new employee faces the company. That encounter can be the deciding factor on whether the employee wants to commit to the company or not.

This thesis focuses on the sales onboarding aspect and aims to discover the factors leading to successful sales onboarding. The objective of the thesis is to create a functional onboarding process for company X's sales personnel.

The research method chosen for the thesis is qualitative research. Half-structured theme interview was the selected data collection method for both of the interview rounds. This research is a multi-method study, as the third phase of the data collection was done in the form of the implementation workshops. The detailed research philosophy, approach and design are based in the research onion model.

The chosen research strategy is action research. It is well suited for solving organizational problems. It was in the end a natural choice considering the researcher's own role inside the organization. The sponsor company's employees act as the co-researchers for the study.

The sponsor company and author decided to conduct the first initial interview round prior the literature review. In order to gain an idea of how the top management sees the matter. Four company X's Vice Presidents were interviewed during this round. The first interview round provided guidance for the literature review.

After the literature review, the author was ready to conduct the next phase of the data collection. At the second interview round, the author conducted eleven sales professional interviews globally.

Based on the interview results, the sponsor company's tutor and author created a proposal for the new sales onboarding process at company X. The new process was presented at the thesis implementation workshops. The new process consists a starting point evaluation and personal onboarding plan for the new sales professional.

The author believes that the new process will speed up the sales onboarding process, increase efficiency and gain cost savings. Company X's HR in cooperation with the management will continue the development work of the sales onboarding process after this thesis project.

Keywords
Onboarding, Organizational Socialization, Sales Onboarding, Company X, Business Area Y, Business Area Z, Sales Onboarding Process, Starting Point Evaluation, Personal Onboarding Plan

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1 Introduction

This thesis aims to develop company X's sales onboarding process. Company X is a middle-sized Finnish high-tech company, a global leader in its field. Naturally sales is one of the important functionalities of the company. The commissioning company wanted to find out how to improve the sales onboarding process in order to speed it up, increase efficiency and create cost savings.

Kauhanen (2010, 151), explains how the onboarding process aims to give a realistic and positive picture of the company and the job assignments. While Noureddin (2018, 58) points out that people will remember the onboarding process, regardless it was positive or negative, because it is a crucial transitional time for the employee. Bauer and Erdogan (2015, 51-52) speak about organizational socialization, which is another term for onboarding. It is extremely important to succeed in the organizational socialization/onboarding process, in order to achieve satisfied and committed employees, who perform at their best and want to commit to the company.

The author is personally very interested in the thesis topic, due to her long experience working in the close cooperation with sales at company X. She has been able to observe some of the struggles the sales professionals face during their onboarding. The author believes that she is able to use her own experience and knowledge as a means to address the correct topics and evaluate the outcomes in reliable manner.

The key factor in this thesis is the sales onboarding. The thesis aims to discover the most important factors in sales onboarding. In sales, time is money. Hence, it is crucial to concentrate on right issues to make sure sales professionals get the needed support from the start. In the end, it will determine how fast they start doing the actual sales and bringing the money back to the company.

This thesis contains altogether seven chapters. After the introduction, there will be a company presentation and key research drivers will also be covered. First round interview results are presented in the chapter 2.5. The first interview round was conducted at the Vice President level, to gain the top management's point of view. The chapter 3 presents the selected methodology and methods used in the study and the chapter 4 illustrates the findings from the literature review. The chapter 5 opens up the results from the main/second interview round covering company X's sales professionals globally. The third and final phase of the data collection takes place during the implementation workshops, which are presented in the chapter 6. First, the author and thesis tutor had a small workshop to draft a new sales onboarding proposal. After that, two separate implementation workshops were held at company X's headquarters with a couple of sales professionals and a sales team head to verify the new proposal. The conclusions are presented in the chapter 7. First, verification of the research objectives and achievements is explained. Following by the future actions at company X and author's recommedations. Finally, author's own learning will be covered.

2 Case Company Presentation and Key Research Drivers

This chapter introduces the case company X Group and its operating environment. It also illustrates the current state of the sales onboarding process at company X and explains the development actions already done at company X's Business Area Z's side. Thus, the author wanted to benchmark those development actions, in order to get further guidance for her research. Next, the research problem and questions are presented, as well as the research schedule. Finally, this chapter covers the first round interviews that the author conducted at the Vice President level at company X. It was decided in cooperation with the thesis tutor, that it would be a good idea to get the initial take on the matter from the upper management's point of view.

2.1 Company X Group

Company X is a Finnish high-tech company and a global leader in its field.

Company X Group key facts and figures:

- The headquarters are located in Finland
- Over 1,000 employees globally
- Tens of offices globally in over 15 countries
- Two Business Areas Y & Z
- 98 % of its production is export
- Customers in over 150 countries annually
- High percentage of staff in R&D
- Listed in the NASDAQ OMX Helsinki stock exchange
- Factories in Finland and USA

(Company X 2018e & Company X Annual Report 2017, 3, 13 & 26.)

Figure 1: Company X Global Markets (adapted from company X's Annual Report 2017, 25 & internal material.)

Company X drives for excellence in high-mix and low-volume businesses. Company X's three business models products, projects and services are used to deliver value to the customers globally. (Company X 2018f.)

Company X aims to understand the customers' needs thoroughly and making sure those will be met. Innovation is in company X's backbone and continuous improvement and learning are used to drive change. In order to excel in its operations, company X's people are constantly sharing, learning and working together and with the other stakeholders. It is important for company X that all the employees are honest, respectful and that they work in a reliable manner. Due to nature of company X's business, it is no surprise that sustainability and ethical behaviour is considered extremely important. (Company X Annual Report 2017, 11)

Figure 2: Value Creation Model (Company X Annual Report 2017, 13.)

2.2 Needs and objectives of the study

The author had different discussions with the sponsor company regarding thesis topics. The initials thesis topic idea did not feel hundred percent suitable for the author, considering its technical relation. Thus, eventually this topic surfaced and it seemed immediately more suitable for the author. She has a long experience working in the sales delivery projects at company X, which naturally means close cooperation with the sales personnel. The author has managed to observe the sales personnel from the beginning stages or their company X career and she has noticed some of the challenges they encounter. Hence, the author was very pleased to find a thesis topic with practical relevance and connection to her daily work. As Saunders, Lewis & Thornhill (2016, 10) state that the author must be capable of undertaking the research topic, as well as be interested in the matter.

Company X welcomes the new employees with an onboarding plan covering the first two to four months of the employment. The current onboarding process is illustrated in the appendix 1. The new employee, hiring manager and HR all have roles in the process. The hiring manager is supposed to guide the new employee through the process with the help of HR and tools provided by HR. Thus, there is a general level onboarding process available at company X and a learning environment eLearning in use, which supports the process. This study aims to discover what can be done to improve the process in the sales onboarding perspective and find out what are the development actions to be done in order to reach that goal.

Company X's Business Area Z is more straightforward product, service and partially system business whereas Business Area Y's businesses contain product, system, project and service businesses. One could state that the business landscape of Y Business Area is more complicated than Z's. Therefore, certain aspects need to be considered based on the operating environment at the particular business area. However, when we think about the basic aspect of onboarding and sales onboarding, majority of the same rules apply.

The author learned that Business Area Z had already done some development work regarding the sales onboarding. Hence, the thesis tutor and author decided it would be good to investigate that little further in order to have a clear outlook on the topic. The author had a discussion with Business Area Z's Management Assistant, who had been developing a toolkit/information sharing centre called Z Online Handbook, in March 2018. The handbook is structured in extremely clear manner and contains links to all the relevant information e.g. product pages and catalogues, different tools such as SalesForce and Company X's eLearning, pricing, distributor and competitor information as well as social media tools. In addition, there is a Q&A section at Z's Openhouse portal, where the sales professionals can ask questions about the products and applications from product managers and industry experts. The author feels that similar type of style as Z's Openhouse portal could be utilized in the actual sales onboarding process.

Based on the preliminary discussions with the thesis tutor and the background benchmarking, it was decided that the author would conduct a first level interview round prior doing the actual literature review for the study. It was considered important to get the top management's initial take on the matter, in order to solidify the sponsor company's need and interest in the research.

2.3 Research problem and research questions

The main research problem/question of the study is based on the research objective mentioned in the chapter 2.2. and is defined as follows:

- How to improve the onboarding process of company X's sales personnel in order to speed up the process, increase efficiency and create cost savings?

In order to answer the main research question, the following sub-questions need to be covered:

- How is the sales onboarding process currently working at company X?

- What are the reasons behind the main challenges in the sales onboarding process?

- What kind of support could help the newly hired sales manager/hiring manager during the orientation period?

- What are the improvement actions needed in order to create a functional and revised onboarding process for sales?

The data collection of this research has been divided in three sections, first and second interview rounds and implementation workshops as the last phase of the research. The first initial interview round was conducted at the Vice President level without theory building. The second/main interview round covered the main research target group company X's sales personnel from both Y and Z Business Areas globally.

Professor Bwisa (2018) states that a good research problem should address a knowledge gap, which in this study is the question of how to improve the onboarding process. According to Professor Bwisa (2018), the research problem should also be significant enough to contribute to the existing body of research and it should lead to further research. The author feels that the research problem definitely contributes to the body of research. It will most likely lead to further research after this thesis has been completed, as it is a real-life business problem and the sponsor company wants to further develop the process also in the future. As Professor Bwisa (2018) states, the research problem should render itself to investigation through the data collection. The researcher should be interested in the topic and it should also suit the researcher's skills, time and resources. Finally, the approach towards solving the problem should be ethical.

2.4 Research plan and schedule

This thesis process started officially in the autumn 2017. Some preliminary discussions were conducted already earlier and the thesis topic changed from the original one. The below figure illustrates the thesis process and the schedule in detail:

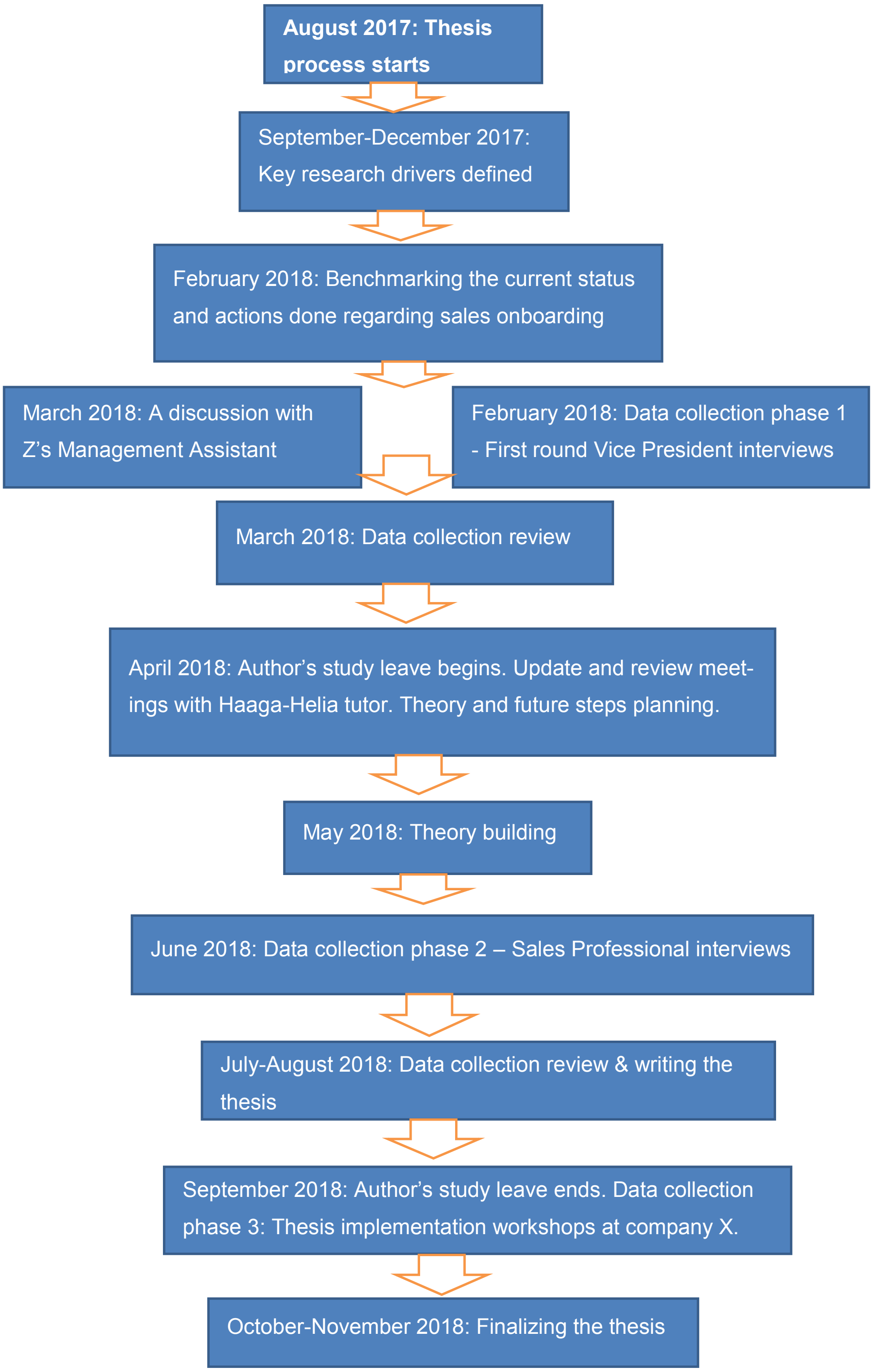

Figure 3: Thesis plan and schedule (designed by author)

2.5 Research results from the initial first round interviews at Vice President level

This chapter covers the results of the Vice President interview round. The detailed research methods used in the interviews are illustrated in the chapter 3.4.1. The interview themes and results are covered in the following paragraphs. The detailed interview questions can be found in the appendix 3.

The general response from the top management was extremely positive towards this study. All the Vice Presidents felt that it is important to develop the onboarding process, as onboarding is one of the strategic actions of the company. The first two of the theme interview questions covered the current status of the onboarding process at company X, and what in the process is working and what should be improved. The third and fourth question were discussing the possible problems in the process currently. The interviewees were also asked what kind of development ideas they had. The author also wanted to know how important the interviewees felt the development of the onboarding process. The final theme covered the status of company X's existing learning materials and how they should be developed for future reference. In addition, the interviewees were asked to elaborate what kind of materials could be beneficial for the orientation purposes.

According to the interviewees, the practical issues of onboarding and cooperation with HR in the first steps of the orientation phase are working rather well though occasionally there can be some sort of IT/tools related issues. However, all the interviewees felt that company X does not have a sales onboarding process. The Vice Presidents pointed out that after the general, company level orientation phase, the hiring manager is left rather alone and it is mainly up to him/her on how well the new employee will be onboarded. There is no official guideline or framework that should be followed during the sales onboarding process. The author also noticed that e.g. company X's eLearning environment does not currently require the users to go through certain themes or information packages. There is a lot of good practical and product related information in eLearning, but it might be difficult to know which ones would be the most relevant. There is currently no compulsory pre-defined learning path for each employee at company X eLearning environment.

One of the Vice Presidents said it well:

> "As the turnover rate of the new sales managers/professionals at company X is rather low, the hiring manager might even be recruiting for the first time. This means, that the person does not have a routine for the onboarding process. It might lead to a situation where the manager does not know/understand the elements that the new employee would need in order to get onboarded fast and efficiently. It might lead to

> a situation where the new employee gets frustrated and in the worst-case scenario decides to leave the company early."

The interviewee also pointed out that "from the company's perspective, it is important to get the best productivity out of the new employee." Thus, a proper onboarding works both ways, in favour of the employee and the company.

Another interviewee was explaining how the process currently goes:

> "We try to put together a training process for the individual to go through the products, application, process etc. The process is recreated every time we bring somebody on. It is left to the individual managers and even in some capacity to employees themselves to be motivated to develop and absorb as much information as they can by e.g. observing different people. A better method would be to design learning blocks, which would be broken down into different components e.g. products, applications, markets, key accounts, regional distribution channels i.e. understanding the business dynamics. The other piece would be where would we train and certify people, so that they have the right skills set."

The interviewees thought that there should be a clear tool kit/onboarding package to follow. It was said that "there should be a check-up list, which would state the competence requirements for the new sales professional. Our sales competence development is not currently in that state that it would clearly illustrate that." According to the interviewees, the hiring manager should be able to check which trainings and information packages are relevant for the employee in question. The information package should be tailored to meet the needs of the new employee depending on the position. It was mentioned that the information is currently scattered. It is mainly up to the line manager to make sure the new employee goes through the needed information.

The need for a specific sales skills training was mentioned in each interview. It was said that the specific sales training skills set is missing. According to the interviewees, it should be clarified what is the company X's style of selling and what are the qualifications and arguments needed to achieve the best outcome. Company X's Business Area Y is currently rolling out a training process XX, which aims to tackle this issue. This study and XX training are linked to each other and the author feels that XX training could be one of the modules/information packages belonging to the revised onboarding process. One of the interviewees stated the following: "There is no official company X guidance available for how to handle the sales event/meeting."

It was emphasized that the onboarding should be an ongoing process. One of the interviewees mentioned that even though company X's staff is experienced, he wondered whether they are qualified in all respects.

> "We take for granted or assume that people doing these things are the best they are. In company X there is "a ten year kind of thing", where people have been around for a long time. If a sales person has been in the position for 10 or 15 years, it is very difficult to challenge them. We have 50/55 percent win rate, which we are observing in some of the businesses in Z Business Area's side. What would happen if we could get additional kind of skills into the sales people, which could push the win rate up to maybe 65 percent? That could have a huge impact to our organization, as the 10 percent increase in win rate is 20 percent in growth rate. "

In company X's case the global aspect needs to be considered, as the sales guys are located in different company X offices or home offices around the world. This means that they do not necessarily have as easy access to information or contact persons as their colleagues who are based at the headquarters in Finland. The following comments surfaced during the interviews:

> "The sales guys often feel that they are rather alone working remotely, going to the customers alone etc. They are trying to solve issues by emailing and calling to the headquarters. It is very important to give them the feeling that they have the organization's support, especially in the beginning phase of the job, when there are many new aspects to learn."

When speaking about the support and training, it was mentioned that:

> "The wrong approach would be to develop a heavy key account management that every sales guy needs to go through for just getting one 2kEUR product sold to the customer. Instead, it should be linked to the level of selling and complexity of sales you are going to do. We should be able to distinguish what type of complexity of sales you are going to be performing, and then link it to the corresponding sales training modules."

The first round Vice President interviewees definitely confirmed the need for this thesis. It was said that developing the onboarding process is important, because "onboarding gives the first impression of the company and defines how the new employee sees the company". The following development aspects were raised in each interview: HR involvement – need for an official onboarding process, sales skills/competence development, a need for structured guidelines/tool kit and specific training depending on the sales role. These issues give the author guidance for the literature review.

When considering the reliability and validity of this interview round, the author thinks that results have proven the process to be reliable. The author was able to conduct the interviews in a similar manner and the results were repetitive. It seemed that the Vice Presidents were open and honest about the needed development aspects and the author did not feel any kind of barrier between the interviewees and herself. The modern tools helped the author to document the process properly and provided an easy access to return to the findings. The author believes that this factor increases the validity of the results.

3 Research Methodology and Methods

This chapter introduces the research methodology chosen for this particular research study. The author also aims to clarify why the methodology and methods in question have been chosen for this study. Finally, validity and reliability of this study will be covered.

According to Saunders, Lewis and Thornhill (2016, 9), all business and management research projects can be placed on a continuum based on their purpose and context. The research method is chosen based on the purpose of the study between basic research and applied research. This research will be applied research, as the idea is to improve understanding of a particular business problem and find a solution for it. People based in the research organization in question conduct the applied research. In this case, the author works for the sponsor company. The research objectives have been negotiated with the sponsor company and the thesis results/implementation is expected to produce immediate value for the organization.

3.1 Research philosophy

When choosing the research philosophy, the author has pondered between pragmatism and interpretivism. In the end, the research philosophy chosen for this study is pragmatism, because it seemed the most suitable for this type of study. Pragmatism insists that concepts are only relevant where they support action (Saunders, Lewis & Thornhill 2016, 143). As the selected research strategy will be action research, it is in line with this philosophy. It is important to take into consideration both objectivism and subjectivism, facts and values, accurate and rigorous knowledge and different contextualized experiences (Saunders, Lewis & Thornhill 2016, 143).

The nature of reality is complex in pragmatism. 'True' theories and knowledge are the basis for successful action. The pragmatism philosophy is focusing on problems, practices and problem solving, which is crucial in this type of organizational research. In addition, the research is value-driven, as pragmatists are mainly interested in practical outcomes. The author naturally wants to create value for the sponsor company. (Saunders, Lewis & Thornhill 2016, 137.)

The researcher's aim in this study, is to solve the research problem:

- How to improve the onboarding process of company X's sales personnel in order to speed up the process, increase efficiency and create cost savings?

In order to solve this problem, the author needs to find out how the element of onboarding is viewed literature wise. Another important aspect is figuring out the state of current onboarding process at company X and the main challenges in it. With this information, the author should be able to present the factors that will speed up the process in reality, which leads to increased efficiency and costs savings. The author has illustrated the research philosophy and methods chosen in the below research onion model in orange.

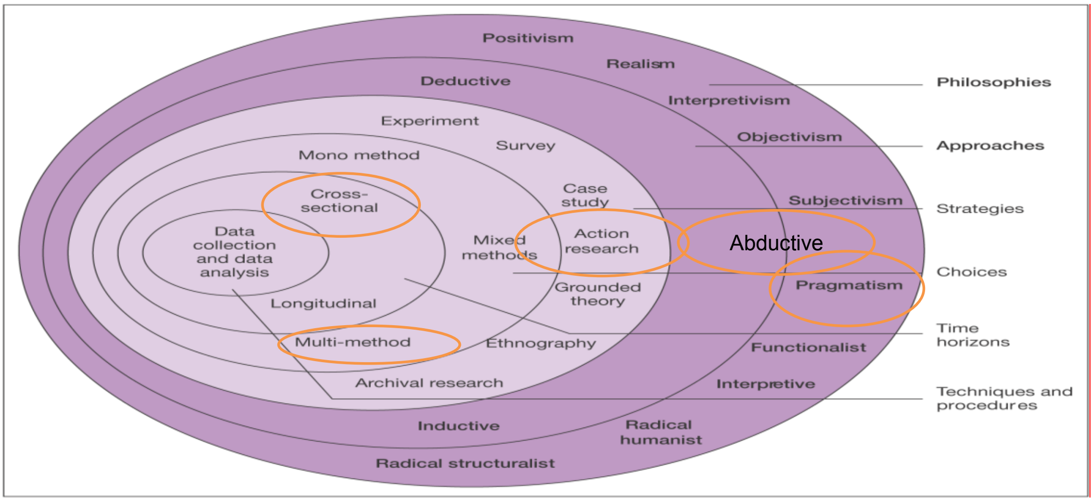

Figure 4: The research 'onion' (adapted from Saunders et al., 2016, 124.)

Ontology is how the researcher sees the reality and how the world works. The author originally considered choosing only subjectivism as the aspect of ontology philosophy in this thesis. According to Saunders, Lewis and Thornhill (2016, 130), subjectivism asserts that social reality is made from the assumptions and consequent actions of social actors, meaning people. The author feels that this type of business research requires a certain amount subjectivity. One needs to be able to interpret and argue the details from different points of views, in order to achieve the best and most reliable results. However, now the author feels that also objectivism will be used especially in reviewing the results of the study.

Epistemology philosophy is aiming to answer the question: "How can we know what we know?" The author needs to consider what is considered acceptable knowledge for this particular thesis. The author believes that both the data quality of this research will be acceptable and the means used to evaluate it. There will be objectivism and subjectivism involved in the process. In practice, the researcher's own epistemological assumptions will determine what is considered legitimate for the research. The results itself can be considered objective as facts of the observable phenomena, however the interpretation and suggestions for the implementation will naturally include certain amount of subjectivism by the author and sponsor company. (Saunders, Lewis &Thornhill 2016, 129.)

Axiology determines the role of values and ethics within the research process. It also considers how we should handle our own values while doing research. We must also think how we deal with the values of research participants. The researcher's own values are an important factor in the whole research process, because it determines the credibility of the research results. The author feels that her core values viewing the world are ethical and respectful. Hence, she believes that those core values will guide her through the whole research process. The researcher's values will provide guidance and vision on the research strategy, as well as practical approach for the study. (Saunders, Lewis & Thornhill 2016, 128-129.)

3.2 Research approach and design

Abductive approach was chosen as the research approach, in order to provide flexibility compared to the other two possible research approaches deductive and inductive. Deductive researches approach the theory building first and test the theory based on the hypothesis (hypotheses) with the data collection. Inductive approach approaches the research by doing the data collection first and theory building second. (Saunders, Lewis &Thornhill 2016, 146-148.)

The author wanted an option to move back and forth with the theory and data. Hence, the first action point in this research was to clarify the starting point by benchmarking the development actions done at company X's Business Area Z. The sponsor company's tutor and author also decided that it would be a good idea to conduct an initial/first interview round by interviewing the vice presidents. Based on the data collected on those interviews, there should be a clear basis for the study including top management's moral support. After that, the author would do the theory building and then move on to the second/main interview round. The so-called main data collection would be done by interviewing the sales professionals. Based on both first and second round interviews and theory building, the author would compare the results and see in case some further theory building would be needed.

The research design is a general plan aiming to answer the research question(s). In this study, the aim is to find out how the onboarding process currently works at company X and how it should be improved. Hence, the author feels that this study is a combination of exploratory, explanatory and evaluative studies. It is aiming to cover how the interviewees see the onboarding process and how it could be improved. (Saunders, Lewis & Thornhill 2016, 175-176.)

3.3 Research strategy

The research strategy chosen for this study is action research. The aim of this research strategy is to develop solutions to real organisational problems through a participative and collaborative approach. This strategy encourages organizational learning as a means to produce practical outcomes through identifying issues, planning action, taking action and evaluating actions. Action research is very suitable for studying organizational problems, as it has emphasis on participation. It is a social process, where both the researcher and the members of the organization are involved. The researcher's role is a facilitator and teacher and the aim is to improve the situation for the participants and their organization. (Saunders, Lewis & Thornhill 2016, 190-192.)

Action research was not the author's first choice for this study, but in the end, that makes sense. The author needs the sponsor company's employees as co-researchers in order to be able to answer the research questions. Naturally, it creates also certain type of expectations from the participants' point of view, in terms of future improvement actions in the company. The author's aim is to create some type of organizational change and development efforts as the result of this study.

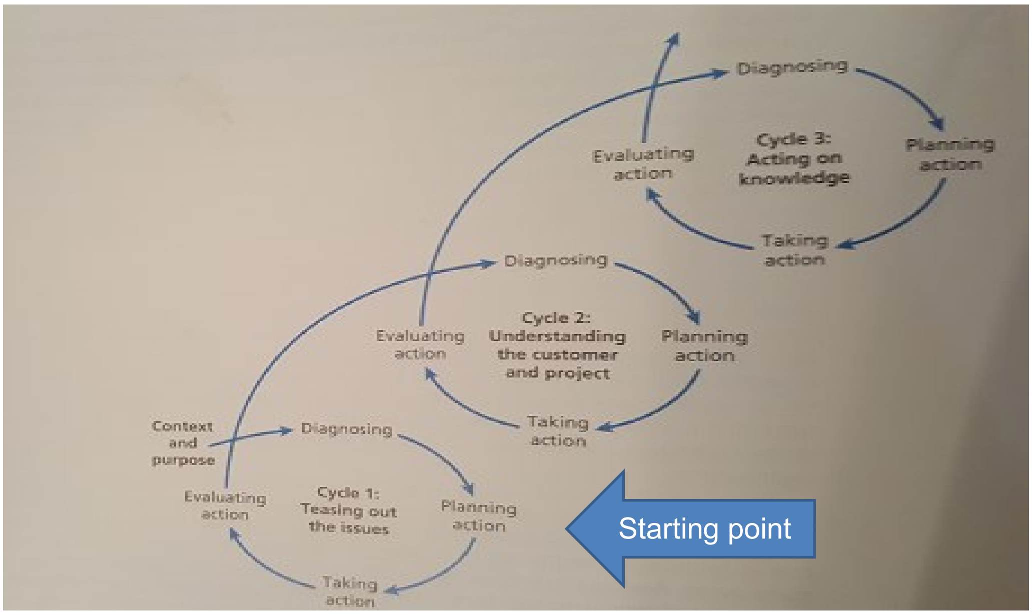

Figure 5: The three cycles of the Action Research spiral (adapter from Saunders et. al 2016, 191.)

Somekh (2006, 8) states that action research creates powerful learning for participants, because it combines research with reflection in practice. The action research process requires certain amount of self-understanding, as participants are research instruments themselves. There is the matter of verifying the research quality, considering how personal values and assumptions of the participants shape the research findings. The researcher aims to take this aspect into consideration when reviewing the interview results.

3.4 Research methods

The research method chosen for this study is qualitative research. It was an easy choice for the research in question, as the half-structured theme interview was chosen as the data collection method. As opposed to quantitative research, qualitative research uses data collection techniques that generates or uses non-numeric data. In case there would be only two rounds of semi-structured interviews included in the study, this research would be a mono-method study. However, as there is a third data collection technique involved, it qualifies this as a multi-method study. The following subchapters cover the detailed data collection methods used in this study. The time horizon for the study is cross-sectional, as a particular phenomenon is studied during a certain period of time. (Saunders, Lewis & Thornhill 2016, 165, 168, 200.)

3.4.1 First round Vice President interviews

The first round vice president interviews followed the inductive approach. The interviews were conducted prior the theory building, because the sponsor company and author wanted to get an initial feeling from the vice president level. The aim was to find out whether the top management considered the thesis topic important and worth studying.

The interview sample was four company X Vice Presidents, two from company X’s Business area Z and two from company X’s Business Area Y. The Vice Presidents covered all the regional areas Europe, Americas and Asia Pacific & Middle East. Three of the interviews were conducted in a face-to-face setting at company X’s headquarters in Finland. The forth interview was done via Skype Online tool, as the interviewee is located in the United States. The Skype Online tool provides a recording feature, which was used in the interview. The interviews were conducted during 2-7 February 2018. A mobile phone recording application was used in the face-to-face interviews. The author wanted to make sure that the interview data is easily available for further review and processing. In addition, the author typed her own notes during all the interviews. The interviews were conducted as semi-structured theme interviews. The author wanted to have a basic structure for the interviews, but also allow certain freedom and flexibility depending on the situation. As Saunders et. al (2016, 391) states, the researcher has a list of themes and possible key questions that are used in the semi-structured interviews. The use of the questions may vary from interview to interview. The researcher can also remove some of the questions in certain interviews, if necessary.

These interviews covered the following themes inside the interview questions: current state of the onboarding process, development efforts/ideas, importance of onboarding and learning materials. The interview questions were drawn in cooperation with the sponsor company's thesis tutor. The vice presidents were all quite well educated in this matter and thus it was easy for the researcher to guide the interviews through with the help of the interview questions. Additional comments/questions were presented whenever needed and the discussions flowed naturally. The interview invitation can be found in the appendix 2 and detailed interview questions in the appendix 3.

3.4.2 Second/main round sales professional interviews

The second part of the data collection took place in the form of sales professional interviews. The author is speaking about sales professionals, as their individual titles vary somewhat. These interviews were conducted with the deductive approach. After the first round's initial interviews were done, the author concentrated on the theory building. At that stage, some data already existed and the researcher could compare the data with the theory.

After the theory building, the research moved on to the main data collection stage. The interviews were again conducted as semi-structured theme interviews. At this stage, the author was already more aware of the research methods. Again, the interview questions were drawn together with the thesis tutor. However, now the author understood that it might be a good idea to clearly indicate and explain the different themes per question. Hence, the author presented the interview questions under three different themes:

1. The sales onboarding process at company X
2. Learning material and support
3. Agile – new practices

The author was on study leave when the interviews were conducted. The fast majority of the interviewees were located in company X's global offices. Hence, the author decided to conduct all the interviews via Skype Online tool. As mentioned in the first round interviews, the Skype Online tool's recording function made it easy for the researcher to document all the interviews. In addition to recording function, Skype also possesses a sharing functionality, which made it convenient for the interviewer to present the interview agenda/themes & questions to the interviewees. The author made additional notes during each interview and aimed to listen and observe the non-verbal responses of the interviewees. The interviews took place during 14-29 June. The interview invitation can be found in the appendix 4 and detailed interview questions in the appendix 5.

3.4.3 Thesis' implementation workshops

The final step of the data collection was the implementation workshops. The author returned to the office after her study leave in the end of August. The thesis tutor and author had a small implementation-planning workshop on 13 September 2018. The author presented the research results and based on that a renewed process map/model for company X's sales onboarding was created.

The author prepared a PowerPoint presentation for the actual implementation workshops based on the draft model. It can be found in the appendix 7. The original plan was to have two sales professionals and their line manager present in the workshop. However, due to some scheduling challenges, two separate sessions were conducted. The invitation to the workshops can be found in the appendix 6. The first session was conducted in a face-to-face setting at company X's headquarters in Finland with two sales professionals (one, who participated already in the interview round and another, who is a new internal transfer in the team), thesis tutor and the author. The workshop took place on 25 September and lasted for two hours. The author presented the proposal for the renewed process and discussion and comments followed.

The second phase of the implementation workshops finally took place on 8 October and it lasted for one hour. The line manager for the sales professionals in question was able to attend this workshop along with the thesis tutor. The author presented the renewed process again and pointed out the comments received from the first workshop. This workshop was conducted via Skype Online meeting function, as the line manager/head of region is based in one of company X's global offices. In order to protect the identity of the participants, the author decided not to disclose the detailed region of the particular sales team. The author can confirm that the participants belong to company X's Business Area Y. Thesis tutor also works for Business Area Y, which naturally affected on the sample selection for the workshops. One speaks about the matters one knows the best.

3.5 Validity and reliability

Two key factors measure the quality of research: reliability and validity. In case the research can be replicated in similar circumstances by using the same research methods, it can be considered reliable. Internal reliability of the research refers to consistency and how it is kept during the research project. In practice, it means how the researcher is able to document the process, store and analyse the data in a consistent manner. In this research, the author aimed to gain the most reliable results by using the same methods in the particular data collection phase. (Saunders, Lewis & Thornhill 2016, 202.)

External reliability assess how well the particular data collection techniques and analytic procedures would work if the researcher or someone else would aim to repeat them. The author believes that the data collection techniques chosen would be easily reused. The detailed reliability assessments can be found respectively under each data collection chapter, 2.5, 5.1 and 6.4. The researcher was aware that her long history in the company and personal experiences related to the topic might be a threat to the research's reliability. Hence, she aimed to pay attention to her own behaviour, to make sure that it would not be a problem. (Saunders, Lewis & Thornhill 2016, 202.)

Validity on the other hand is related to the chosen methods and how reliable they are. It estimates how well suited the chosen research methods are for the research in question, as well as evaluates how accurate the research results analysis is. In addition, validity assesses the generalisability of the research finds. The research methods used in this study were highly appropriate due to the qualitative nature of the research. The semi-structured theme interviews were in practice the only sensible options for this research. (Saunders, Lewis & Thornhill 2016, 203.)

Due to the small sampling size, quantitative methods did not seem appropriate. In order to gain the most reliable results, the only way to dig deep enough into the matter was to use interviews. The research findings demonstrate validity, as the first interview round complied with the results of the second interview round. The theory building also supported the results gained from the both interview rounds. Finally, the implementation workshops solidified the findings and a new sales onboarding process was created.

4 Onboarding in Literature

In this chapter, the author aims to clarify what is the difference between onboarding and orientation concept. The author also attempts to verify the importance of onboarding, how to do it successfully, what it means from the sales perspective and how the process should and could be developed.

4.1 Onboarding vs. orientation concept

The basic idea of the onboarding process is to familiarize the employee with the company and its business idea, including mission, vision and values. It is a process, where the employee is going to meet the whole work community, the immediate colleagues within the same team/unit and the other colleagues within the company. The new employee will naturally get acquainted with the customers. Lastly, the specifics of the particular job role and the related expectations from the employer's side will be covered. (Kauhanen 2010, 151.)

Dessler (2017, 269) lists the following four steps for the manager to complete during the new employee orientation/onboarding process:

1. Welcome the employee into the company and team
2. Organize the practical issues such as tools and personnel policy issues and expectations regarding work behaviour
3. Introduce the company and operating environment to the employee
4. Start the socialization process by introducing the company's culture and working practices

Kauhanen (2010, 151), explains how the onboarding process aims to give a realistic and positive picture of the company and the job assignments. While Noureddin (2018, 58) points out that people will remember the onboarding process, regardless it was positive or negative, because it is a crucial transitional time for the employee.

The steps that Dessler and Kauhanen listed are regular onboarding practices i.e. orientation, which would be expected to take place when a new employee enters the company. CUES (2018) states that orientation is not onboarding, and that instead of concentrating on the practical issues the companies should focus on making the employee onboarding a long-term success. Georgia State University's Human Resources (2018) and Lewkovich (2017) also point out that orientation is merely one part of the whole onboarding process. According to Georgia State University's Human Resources (2018), the whole onboarding process generally contains elements such as new employee orientation (NEO), benefits, ethics, right to know, job expectations and performance, policies and procedures and finally training.

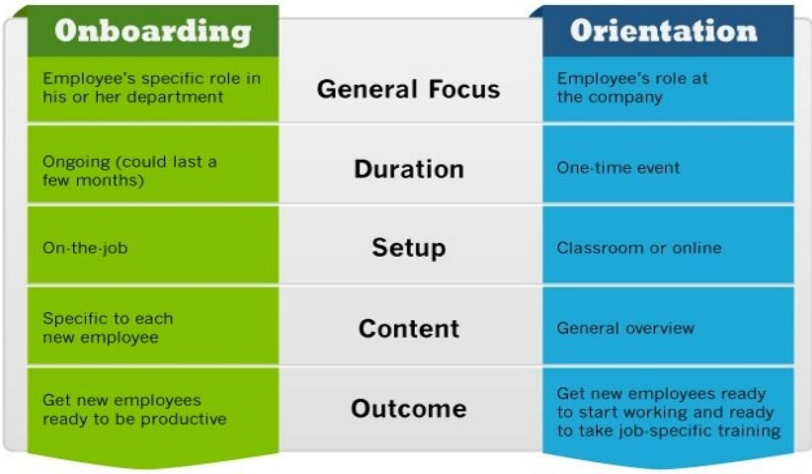

Figure 6: Orientation vs Onboarding (Lewkovich 2017.)

The new employee orientation should take place in the first days or weeks of the employment. The orientation event is generally a conference-style occasion, where all the recently hired employees from different departments of the company attend. Generally, the orientation event contains presentations as well as question-and-answer sessions. The company's leaders usually present themselves, their own departments and their roles in the business. Some companies also offer an online self-guided training prior the orientation event, in order for the new employees to familiarize themselves with the company. (Sims 2017.)

Onboarding on the other hand describes the whole process of getting the employee acquainted with his/her new daily job and making sure the person is settled into the company. It is an ongoing process, which aims to make sure that the employee understands what is expected from him/her in order to be successful in their new job. The process should review the details of the employee's daily job and as well as how it is reflected to the company's organizational goals. In case the process is successful, a great hire should turn into a great employee. (Lewkovich 2017.)

BirdDogHR (2017) and Lawson (2018) state that onboarding is a process and orientation is a key element of that process. Onboarding can also be described as organizational socialization. According to Bauer, Bodner, Erdogan, Truxillo & Tucker (2007, 707), the employees become organizational insiders during the process. Abusamra (2015), Bauer and Erdogan (2015) and Lawson (2018) explain that organizational socialization is a process, where the employees adapt the skills, knowledge, behaviours, practices, culture and values that they need in order to successfully become a recognized member of the organization.

Mertz (2015, 34) thinks that onboarding is structured process covering a time period of several months. He states that the process requires organization-wide input. It covers the company's policies and procedures, processes, relationships, feedback, aspirations and development. The whole onboarding process ensures that the new employees will be committed with the company and become successful in their roles. In the end, that will reduce the turnover and increase accountability. The orientation is described more as an event in a day or series of event coordinated by the HR. According to Mertz (2015, 34), the orientation process is more focused on benefits, policies and procedures. There should be a follow-up meeting within 30 to 60 days once the new employee has started in the company. Practical issues such as payroll, benefit programs and needed compliance trainings should be addressed in the orientation phase.

As a conclusion, it can be stated that onboarding is the whole process and orientation is a key element of that process. The onboarding process should start on the first day of the new job or preferably even earlier.

4.2 The importance of onboarding

However, why is the onboarding process considered so important? According to Bortz (2018, 45); Fleming (2018); Hirsch (2017) and Noureddin (2018, 57), how the onboarding process works starting from day one, will determine how the new employee feels about the company. It can also have a direct effect on the employee retention. Bortz (2018, 45) and Fleming (2018) state that roughly 20 percent of the employee turnover occurs within the first six weeks of the employment. Thompsen (2010, 61) says that the time cap to get the new employees integrated into the company is only four to six months.

Bauer (2010, 1) considers that the faster the new hires feel welcome and ready to start performing the job, the faster their actions also contribute to the company's mission. Thompsen (2010, 63) thinks that the faster the new employee is able to move from the first day of orientation to the actual day one on the job, the more likely the person is going to stay in the company for a long run. Tanner (2018) states that 69 percent of employees are more likely to stay with the company for three years in case they have experienced great onboarding. A study done by Wynhurst Group in 2007, discovered that the employees are 58 percent more likely to stay in the same company after three years, in case the onboarding program has been structured (Farren 2007). Hogan (2015) at Forbes believes that a standardized onboarding program shows the new employees the company's appreciation towards them. She thinks that in case the company is able to demonstrate gratitude, support and appreciation towards the new employees, the new hires will in return feel seen, heard and accountable.

The onboarding should be viewed as a continuation of the recruitment process. In case a company is able to provide a standardized, consistent and strategic onboarding process, it will result in higher rates of employee retention, engagement and performance. (NSCA 2017) The following four components are critical in terms of employee onboarding:

1. "Compliance: Rules and regulations
2. Clarification: Roles and responsibilities
3. Culture: Organization personality and values
4. Connection: Relationships with existing staff, supervisors, and mentors"

(NSCA 2017.)

In case the onboarding process speeds up new employee adjustment into the company, it will act as a major advantage for the company in the form of higher job satisfaction, lower turnover, and lower employee stress levels. As Bortz, Fleming, Hirsch and Noureddin stated earlier, NSCA (2017) also believes that the first day is crucial in terms of setting the tone for the first year of a new job. It is extremely important to nail the onboarding process and avoid the norm of half of the new employees leaving their jobs within the first year. (NSCA 2017.)

Mota (2016) points out that in case the company has a weak or non-existent onboarding program, it can cause higher turnover rates or employees who do not meet expectations. According to Allied Van Lines (2012) Workforce Mobility Survey: Onboarding and Rentention, companies lose a quarter of all new hires within a year. In addition, many other new hires never reach their target productivity levels. The study shows that many companies do not follow the following practices with the new employees:

- "Measure employee retention and/or productivity
- Budget for onboarding programs
- Provide mentoring or coaching
- Train as a component of onboarding programs
- Establish clear expectations
- Engage with new employees to evaluate job satisfaction"
  (Allied Van Lines, 2012.)

Bts Insights (2018) also acknowledges the fact that in case the onboarding process is successful, the employees will reach higher productivity levels faster. According to them, the average cost of losing a valued new employee is from $15,000 to $40, 000, and it can be much higher for senior executives. Allied Van Lines (2012) survey discovered that to fill one position costs on average $10,731, with and an additional $21,033 per new relocation hire. When an employee decides to leave the company, the whole hiring process begins anew.

Successful onboarding means cost savings, increased productivity, improved employee retention, higher employee satisfaction and engaged employees. These engaged employees will execute the organization's strategic goals and deliver results. The below figure demonstrates that. (Bauer 2010, 6, 17.)

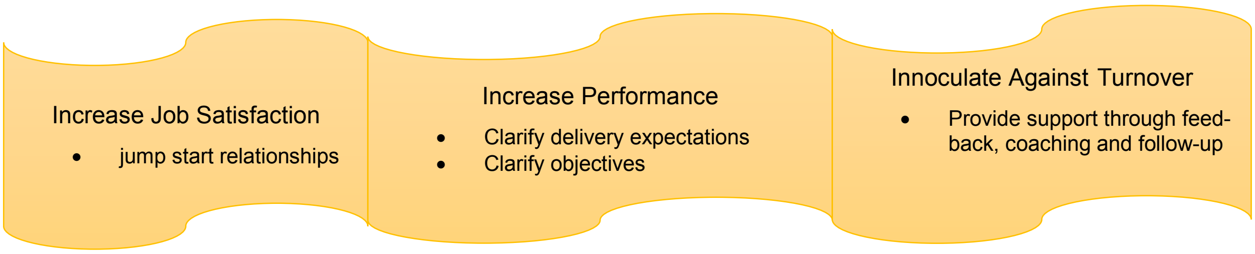

Figure 7: The pros of onboarding (adapted from Bauer 2010, 2.)

Successful onboarding or organizational socialization can result in effective employees with positive work attitude, who stay with the company for a longer time. However, in case of ineffective socialization, it can cause the employees to leave prematurely or make their performance inefficient. This means that the company has to start the recruitment process anew, which leads to loss of time and resources. (Bauer & Erdogan 2015, 51.)

Based on the research by Bauer, Bodner, Erdogan, Truxillo and Tucker (2007, 707-708 & 718), the three main indicators for a new employee adjustment are role clarity, self-efficacy and social acceptance. These elements mediate the relationship between newcomer information seeking and organizational socialization tactics and socialization outcomes, such as newcomer performance, work attitudes and turnover.

Bauer and Erdogan (2015, 51-52) illustrate the organizational socialization i.e. onboarding of the new employees, in the below process model. They state that many factors affect in successful socialization process of new employees. These factors are divided under three categories: new employee characteristics, new employee behaviours, and organizational efforts. The new employee characteristics describe the employees' indivual differences based on their background and personality traits. These factors can play significant role in organizational socialization. The new employees are actively involved in the socialization process. They are seek information and feedback in terms of their actions, as well as build relationships. The organizations on the other hand use different socialization tactics in order to facilitate organizational socialization. They can for example provide formal orientation activities or mentoring.

Newcomer adjustment measures how well the new employee has adjusted in the organization. The four key factors measuring that are role clarity, self-efficacy, acceptance by organizational insiders and knowledge of organizational culture. Role clarity determines how well the new employee has been able to adapt the new job. Self-efficacy instead refers to the employee’s sense of confidence level of mastering the new job. Acceptance of the peers and managers is very important for the new employee, showing how well they have adjusted. Knowledge of the organizational culture and understanding how the company functions is a key factor of employee socialization. In case the company succeeds in organizational socialization, the outcome will be satisfied and committed employees with increased performance and lower turnover. (Bauer & Erdogan 2015, 51 & 57.)

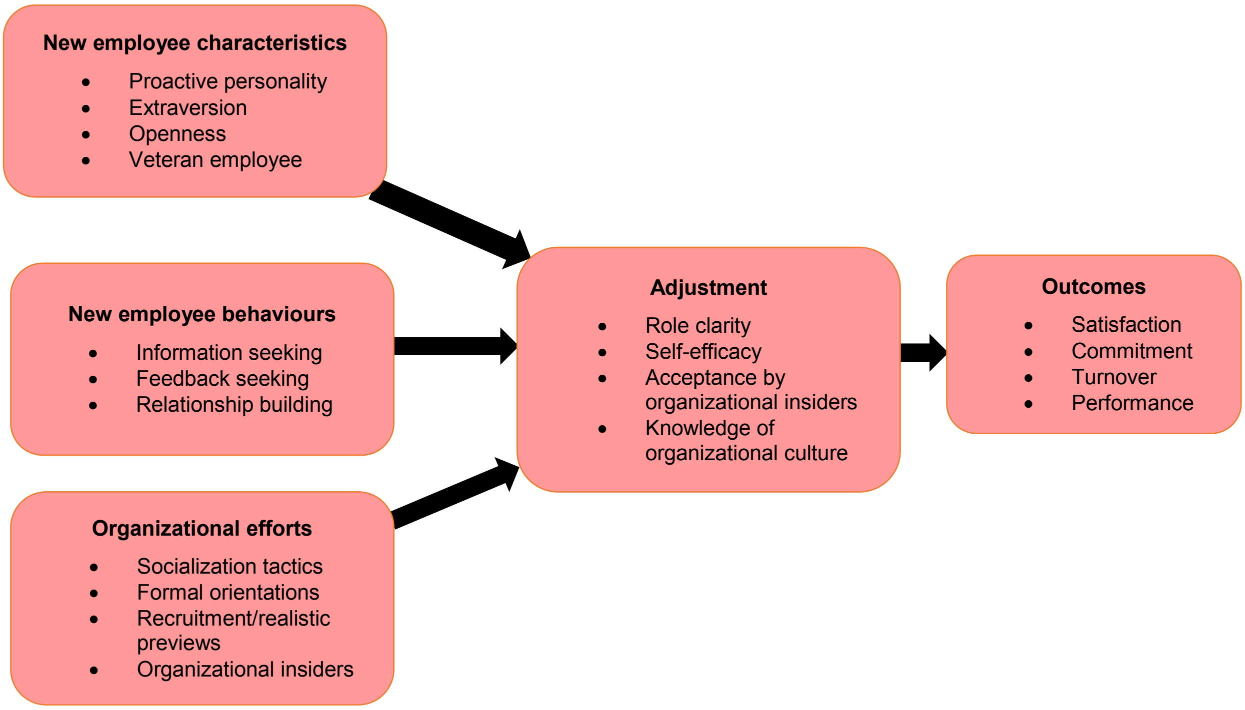

Figure 8: A summary process model of socialization (adapted from Bauer & Erdogan 2015, 52.)

As a conclusion, literature review confirms that onboarding is considered highly important. It can have an immediate effect on the employee retention starting from the first day of the employment. In case the employees are satisfied with the onboarding process, they will show their satisfaction in their performance and commitment to the company.

4.3 Onboarding strategies

Bauer (2010, 2) states that there are four separate levels in onboarding. ***Compliance*** is the lowest level, which consists of teaching the employees the basic legal and policy-related rules and regulations. ***Clarification*** aims to make sure that the employees understand their new jobs and all the related expectations. ***Culture*** is a wide category that provides the employees for example an understanding of both formal and informal organizational norms. Lastly, ***connection*** is about the interpersonal relationships and information networks that are crucial for the new employees. Depending on how the company utilizes these four building blocks, it will determine its overall onboarding strategy.

Table 1: Four Cs vs. Onboarding Strategy (adapted from Bauer 2010, 3.)

Onboarding Strategy Level	Compliance	Clarification	Culture	Connection
1 Passive	YES	SOME	LITTLE/NONE	LITTLE/NONE
2 High Potential	YES	YES	SOME	SOME
3 Proactive	YES	YES	YES	YES

There are three separate levels of onboarding based on these Four Cs: ***passive, high potential and proactive***. In case the company's onboarding strategy is passive, it will contain the elements of compliance and most likely certain level of clarification. However, the culture and connection are generally not addressed, at most in an informal manor without any prior planning. Based on the research, approximately thirty percent of the companies have a passive onboarding strategy. ***Passive onboarding*** can be functional, but it is not systemically organized. (Bauer 2010, 2-3.)

When a company has a formal onboarding strategy and practices that cover both compliance and clarification blocks and it also touches the topics of culture and connection, the company has reached a ***high potential onboarding***. It means that even though they have formal onboarding practices in place, they have not yet been able to establish the complete process across the company. About fifty percent of the companies belong to this category. (Bauer 2010, 3.)

Proactive onboarding has been reached, when all the four building blocks are formally included and addressed in the company's onboarding process. Approximately only twenty percent of the companies reach the proactive onboarding level. In case the company is organizing their onboarding process systemically with a strategic human resource management approach, it has reached the level three of proactive onboarding. (Bauer 2010, 4.)

One could think why it is necessary to reach the proactive level of onboarding. Would not the high potential level be enough? Companies use some much time, money and resources for the recruitment process that it would be foolish to settle for the second best option. Bauer (2010, 4) presents the IBM case, which illustrates why indeed the companies should aim for level three. IBM's management noticed in later 1990s and early 2000s that they were doing fine in terms of onboarding the new employees. However, despite that they were not able to reach the proactive level in the onboarding process. (Bauer 2010, 4.)

IBM created the Assimilation Process, based on the realization that the new hires have different needs than the long-term employees. The process consists of three steps: ***affirming, beginning and connecting***. In the ***affirming phase*** occurs prior the new employee's start date and it includes welcoming the employee, taking care of the practical arrangement including the tools and assigning a coach. ***Beginning stage*** happens during the first month of the employment. It aims to clarify the roles and responsibilities, encourage the newcomer and have check-in meetings with the manager in order to observe the new employee's progress at IBM. (Bauer 2010, 4.)

Connecting phase takes place during the first year of the employment and it has three stages. "Ask the coach" stage happens after the first two months aiming to make sure the new employee is on track with his/her employment. The meeting also aims to encourage networking, in order for the new employee to find interest communities within the company. Once the new hire has worked in the company for four to six months, IBM wants to concentrate on the employee's accomplishments and understanding of IBM's working style. IBM considers that the new hire will be fully integrated into the company within one year. The coaching element has proven to be one of the best outcomes of IBM's assimilation process. The coach is able to answer the new employee's questions, reinforce concepts, share processes and tools and open up the company culture. With the help of the new process, IBM was able to reach the level three onboarding organization. (Bauer 2010, 4)

Forbes Coaches Council (2017) speaks about seven topical strategies. They point out that the new employees should be exposed to workplace culture and the companies are starting to see the strategic importance in it. Workplace culture is in many ways a combination of small nuances and those nuances are never found in an instruction manual. The second strategy Forbes Coaches Council (2017) mentions is mentorship programs. They state that in fact there the mentors are the ones guiding, leading and making sure the new employees are integrated properly.

In order to succeed in the onboarding process continuous follow-up is needed. Clear goals and objectives need to be set for the new employee. The company should make sure the new employee has the right tools and equipment to perform the job. They should also provide constant feedback and acknowledge a job well done. Onboarding is starting to be seen more as a team sport, instead of just individual HR effort. The companies are using first 90 days mind-set, which means that besides the HR, all the other stakeholder groups of the company from colleagues to the CEO should be making sure the new employee is settled well into the company and its culture. (Forbes Coaches Council 2017.)

The sixth strategy Forbes Coaches Council (2017) mentions is appointing a buddy, a veteran employee who will get the new employee acquainted with the company. The meetings should take place weekly in the first month of the employment and at least monthly during the first six month. The veteran employee should be given the needed time to concentrate on the mentoring assignment, even when it is time away from the daily productive work. This type of work is also highly valuable for the organization. As the final strategy Forbes Coaches Council (2017) predicts that in the future companies will use more external support/coaching in their onboarding process.

To summarize the findings of the onboarding strategies, it is clear that some kind of strategy is needed. Not all the companies might want to aim the highest onboarding level proactive onboarding, but they should still be conscious of the strategy they use. The new employee should be acquainted with the company’s culture and the people, in addition to the daily work. Onboarding is a changing element and will most likely be handled differently in the future. In order to reach the best results, the whole organization should be engaged in the process.

4.4 Onboarding the sales personnel

In this chapter of the literature review, the author aims to dig deeper on the aspect of sales onboarding. What are the measures that companies use and need to use, in order to get their sales reps on boarded efficiently and promptly? What are the potential obstacles in the process? Finally, the author aims to find out what are the factors leading into a successful sales onboarding.

Andersen (2014, 56) explains how a recent IDC research found out that companies spend $ 5 billion annually to roll out the best practices into the organization through sales training. However, more than 80 percent of the salesforce failed to retain what it learned after 30 days. According to Andersen (2014, 56), this is due to the current level of onboarding. The onboarding is often lengthy, ineffective and conducted exclusively in a classroom setting. This means that the new sales representatives cannot train their skills in the field.

Xactly Media (2017) speaks about the ***three R's***: **retention, ramp time and results** related to sales onboarding. It emphasizes that it is important to nail the onboarding stage after a challenging and costly hiring process. They explain that ramp time of a new sales representative cannot be too long and the onboarding process too traditional, in case the company wants to achieve fast results. Instead, it is suggested that the sales representatives should be provided access to smaller, more consumable training materials, to which they could easily return and refresh their knowledge. If the sales representatives are provided the right toolkit to work with e.g. real-time sales coaching and onboarding training, they have the means to achieve great results in less than one year.

It is critical to get the sales representatives onboarded promptly by modelling the behaviours and objectives that align with the company's overall corporate goals. They speak about the ***three C's***: **cut the content overload, coach for sales success and cloud-enabled aspects**. The content overload means that the sales representatives should focus on the most essential information and be able to review it repeatedly. Coaching should be viewed as ongoing and long-term process, as well as sales itself. The companies should use their star players to coach the new sales representatives and for example record their best sales pitches and conversations for coaching purposes. (Xactly Media 2017.)

Cloud-enabled means that the companies should use the modern technology to assure that all the relevant information, training materials and coaching are available online no matter what the representative's location is. The sales representatives should be provided some kind of an automated dashboard, which would contain all the relevant information such as CRM, CPQ, sales performance, commission payments and onboarding in the same location. This would lead to speeding up the whole onboarding process and get the actual selling started promptly. The management would also be able to follow up the progress and notice in case some hiccups would emerge. (Xactly Media 2017.)

Valenti (2016) represents ten keys to sales onboarding success:

1. It should be clarified what onboarding actually means and find out what the sales representative really needs to get fully on board. There should be a measurable and specific definition for that. The sales representatives should also be clarified what are their goals and what the company expects from them.

2. Onboarding should be organized around the job and not the topic. This means that once the big picture of the job is provided in the training, the new hires are able to connect the smaller details with it.

3. Onboarding should teach the big picture and also the small details. The sales representatives need to understand the company's strategy, market place and sales organization's priorities, but they also know the small details in order to operate in their daily job.

4. Onboarding should take a just-in-time approach, where the learning process is combined with a little bit of application and a little bit of feedback. The real-life application and feedback build lasting knowledge and skills.

5. The company should offer examples of what the right looks like during the onboarding process. It can be done by providing example emails, scripts for calling, agendas for meetings and discussions and templates for presentations.

6. Structured job shadowing should be provided during the onboarding process. In the shadowing process, the new representative is observing the senior employee. The new employee can be given certain assignments regarding what to specifically observe during the shadowing. The process can also be done in reverse order, where the senior representative shadows the new one and gives them feedback afterwards.

7. Onboarding should be in connection with real-life activities. Pure role-play is not enough in the training situation, as there is no real pressure or unpredictability of a real-life situation. Thus, the new sales representatives should be able to practice their new role in a real-life customer set-up.

8. The onboarding process should aim to foster individual accountability. Referring to the goals stated in the first key element, the goals should be clarified for the representatives and the management should be able to follow them. It will lead to reps being more accountable for their own performance.

9. Onboarding should give an opportunity for the individuals to create knowledge. Sales reps should be the ones creating the needed learning material such as sales playbooks themselves and they will learn during the process. This way the management is able to follow up and see what the reps have learned. They can also see where some additional coaching would be needed.

10. Onboarding should always be considered as a learning process. There is always something new to learn about sales. That is way the sales onboarding program should be structured as a continuos learning cycle, instead of just one time event.

Battaglia (2017) states that 84 percent of sales training is lost in 90 days, which shows that better onboarding and sales training is needed. He emphasized the following five themes that were reoccurring at their sales leaders' onboarding plans. The reps should start as a cohort, if possible. Battaglia (2017) explains that this way the reps are able to cooperate and see how others work. This strategy will also breed some competition and encourage the reps to achieve their goals and perform at least as well as their peers. The onboarding plans should aim for productivity by providing designed and repeatable steps. This way the employees would be able to drive consistent productivity gains and simultaneously correct possible flaws in the onboarding process.

Battaglia (2017) continues that it is important to introduce the reps to the business. They should be able to comprehend the entire business lifecycle from product development to customer experience. High-level overview of business financial metrics such as customer acquisition cost and lifetime value should be presented to the new reps. This leads to reps grasping the whole business and they will be empowered to deliver excellent results to the company. According to Battaglia (2017), even more important aspect than presenting the business lifecycle to the reps, is to present the company's personnel. When the reps meet people across the business, it helps creating a warm and friendly company culture, as well as boost retention. Similarly as Valenti (2016), Battaglia (2017) thinks that the sales reps should not be learning in a vacuum. He proposes that the reps should practice alongside their peers and managers. Eventually it will turn the reps into high-performers in real-life.

Weiss (2015) explains what LexisNexis Group and their Vice President of Performance Development Darryl Cross did to reinvent the sales training. They use three separate types of training in their process. The first one is onboarding for the new sales reps. They aim for the new rep to gain understanding of the company within the first 30 days. The reps are expected to speak about the company and the products during this time. During the second month of employment, the reps should be able to talk to the customers about the specific solutions the company offers. The rest of the first year is used to help the salesforce to turn into independent and continuously improving cohort, who are able to sell 100 percent of their quotas.

The second phase of the training according to Weiss (2015) is product training. The sales reps naturally need to gain understanding of the company's products, their functionalities and advantages compared to the competitors. They need to be able to explain what the effects of the solution are and why it is crucial for the customer. The third type of training is sales and negotiation skills. They use video recording in the process, in order for the reps to see themselves how they performed. LexisNexis sees that in case the rep does not succeed in certain part of the training, it is due to the learning retention. It might be that the reps previous experience is not in-line with the current role or it is not in-sync with the particular customers. For this reason, Lexis Nexis aims to develop programs that include a lot of practice in real-life situations. They have the following five components of training and coaching: emphasizing fundamentals, situation planning, simulation, reflection and continuous improvement.

To conclude with a couple of main points related to sales onboarding. In sales, time is naturally money. It means that the faster and more efficiently the new sales person has been onboarded, the faster he/she will start making money for the company. The sales onboarding should focus on the most essential factors in terms of the sales role in question. The onboarding process should quickly connect the sales person to the real-life situations, in order to learn and observe for example from a veteran employee. The onboarding process should be a continuous process. The management should follow-up the process in order to discover the needed development and support actions for the individuals.

4.5 Successful onboarding practices

This chapter examines the factors that contribute in developing successful onboarding practices for companies. The author aims to gain an understanding on the popular onboarding practices used and successfully executed in companies. Potential new/agile onboarding practices will also be covered.

4.5.1 Role clarity and tools

Bortz (2018) explains that Facebook has set up a 45-minute rule, which means that the new employee should be able to start working within 45 minutes from entering the company, because all the tools and devices have been set up in advance. The 45-minute rule can probably work in terms of the tools and devices, but it is naturally not realistic in terms of the onboarding concept in general. However, the author feels that there is a word of wisdom behind Facebook’s rule. If the company is able to prepare for the new employee’s arrival in advance, it will speed up the beginning stages of the process. Bortz (2018) states that the new employee should be given as much information as possible in advance, in order not to waste time in the face to face situation.

Crafford and Kapusinski (2014) also agree that the onboarding process should start well in advance prior the new employee’s arrival. They emphasize that it would be important to organize all the practical issues such as tools and devices in advance, as well as clarifying the expectations. This way the company would also ‘sell’ themselves to the new employee by giving a good impression. Bauer (2010, 4-6) mentions four major aspects, related to both job roles and social environment, that can be used to maximize the onboarding success. They have also been presented in the below figure:

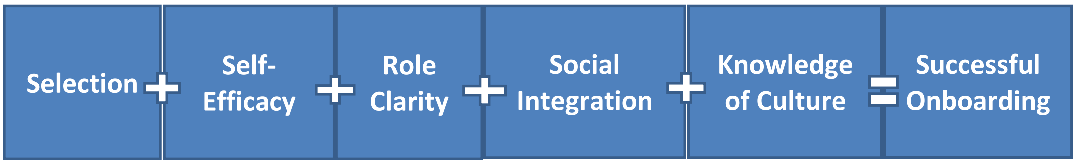

Figure 9: Adjustment period for the new employee (adapted from Bauer 2010, 6.)

Bauer (2010, 4) thinks that boosting the new employees' confidence in performing their job well. According to her, it eventually make them more successful than those that in comparison do not have a good sense of self-confidence. It has been shown that self-efficacy has an affect on organizational commitment, satisfaction and turnover. Vernon (2012, 32) points out that new employees want to know how to achieve the status of valued team members. They want to receive reinforcement that they did make the right choice by accepting the job offer.

Both Bauer (2010, 5) and Vernon (2012, 33) speak about role clarity. It is extremely important that the employee understands his/her role and expectations. If the employers succeeds in that, they will in return receive less performance problems and increased accountability from the employees' side. Burt (2018) seconds that when the onboarding experience is successful, the candidate has a completely clear, authentic and transparent view of the role.

4.5.2 Social integration and culture

Bauer (2010, 5-6) also speaks about social integration. She explains that when a new employee meets and starts working with "the organizational insiders", they learn a lot during the process. The new person also needs to feel comfortable and receive acceptance from the colleagues. According to Bauer (2010, 5), "Research has long found acceptance by peers to be an indicator of adjustment." She lists the following measures that can ease the social integration:

- Small talk with colleagues
- Informal social situations such as lunches or coffee breaks
- Participation in voluntary activities
- Relationship building with the supervisor by taking on new assignments and completing them successfully
  (Bauer 2010, 6.)

The cultural aspect should not be neglected in the onboarding process. Bauer (2010, 6) and Vernon (2012, 33) emphasize how important it is to engage the new employees with the company culture. Besides understanding the company's goals, vision and values, the new employee should also be advised about the company's politics and unique internal language. They propose that once you get the culture aspect right, all the other aspects will come together as well.

As it was similarly emphasized in the chapter 4.3 by Bauer (2010, 2) and Forbes Coaches Council (2017), the cultural aspect of onboarding is mandatory in case we want to achieve a successful onboarding process.

4.5.3 ADKAR change management model

The author feels that one of the most important realisations, if not the most important, is that onboarding is a process or it should be one. Lewkovich (2017), BirdDogHR (2017) and Lawson (2018) pointed that out in the chapter 4.1. According to Karambelkar & Bhattacharya (2017, 5), “Onboarding is the process by which new hires get acclimatized to all aspects of their jobs rapidly and easily, and learn the knowledge, skills, abilities (KSA) and behaviours required to function effectively within an organization”.

Karambelkar and Bhattacharya (2017, 5) are introducting a change management model ADKAR, which can be applied to onboarding.

A=Awareness
D=Desire
K=Knowledge
A=Ability
R=Reinforcement

The first phase of the model is awareness. It is supposed to illustrate what a great workplace the company is and the importance of the new employee’s own role. The awareness can be created at an event such as an orientation day, where the company structure, core values and culture should be presented. A person with credibility should do the company presentation. The orientation event should create nice memories for the new employees. However, the awareness should not end to the orientation day. The line manager should be on top of his/her superior’s skills and background, in order to be able to analyse the onboarding requirements. An onboarding plan should be created including timely provision of key information without overloading. The key for the awareness phase is communication and access to information. (Karambelkar & Bhattacharya 2017, 6.)

Karambelkar and Bhattacharya (2017, 6) explain that once the new staff joins the company, they are naturally highly motivated after successful selection. However, they might also be afraid of the unknown at a new workplace. The manager should set the context right, ensure the role clarity and set expectations, in order to improve or sustain motivation and reduce anxiety. During this phase, the manager should emphasize opportunities and support such as career growth; professional growth and assistance for education; social events and social opportunities; access to information and resources; and availability of coach or mentor. These are the factors that actually answer the question "What Is It For Me?" (Karambelkar & Bhattacharya 2017, 6.)

The knowledge phase of this model is about confidence building. The new employee is supposed to gain knowledge about the processes and products via mix of methods such as, online courses, mentoring, formal classroom training and coaching. System and tool training, as well as ethical, legal and policy related issues are also covered during this phase. The next phase is ability, which means capacity building. The new employee will demonstrate his/her knowledge and capability in the role in question. Coaching and mentoring can be provided to build abilities. In this phase, the new employee also connects with the team and starts building the relationships, as well as gets accustomed to the culture. In the final reinforcement phase happens the sustainability. In practice, the new employee realizes his/her accountability towards the job. After the probationary period ends, some kind of small celebration would be called for. This would help the new employees to maintain the motivation to perform also in the future. Naturally, the rewards in general and recognition program help the reinforcement as well. (Karambelkar & Bhattacharya 2017, 6-7.)

Bortz (2017/2018, 45) explains that over a third of employers do not have a structured process in place for onboarding. This type of attitude can cause the employees to think that the employer does not care about them and that they are left on their own in the process. According to Bortz (2017/2018, 46-47) there are five ways to improve your onboarding program:

1. "Start early
2. Preview the program
3. Make it fun
4. Create informational videos
5. Solicit feedback"

A common nominator in the literature clearly is the aspect of starting the process prior the arrival of the new employee. The new employee should be provided relevant information and give a chance to ask further questions. The employee should also receive an onboarding roadmap, which would describe the first weeks and months of onboarding. More agile way proposed would be to use games to present the company walkthroughs. It was also proposed that informational videos would be created to give taste of the company to the new employee. It was emphasized that there would be no need for a big budget for the videos, more like creative spirit. Last but not least, the company should collect feedback from the new employees in order to improve the onboarding process. The insights and thought of the employees should be shared with the executive team as well, in order to get leadership invested in the process. (Bortz 2017/2018, 46-47.)

Bauer's (2010, 16) opinion is in line with her peers, as she also thinks the process should start prior the first day on the job. She proposes that the first day on the job should be special. According to her, there should be a formal orientation program and a written onboarding plan available. She emphasizes that the onboarding should be participatory and that the stakeholders should be engaged in the planning process. She also pointed out that the program should be consistently implemented and monitored. Technology could be used to facilitate the process and clear milestone should be stated in order to follow-up the progress.

4.5.4 Creating a coaching culture

One of the current agile practices in onboarding is coaching. Cappelli and Tavis (2018, 49) explain that the companies that are the forth runners of agile talent practices invest in sharpening their managers' coaching skills. They speak about Cigna, DigitalOcean and P&G companies who are using coaching as an agile onboarding method. Cigna's managers go through a coach training meant for busy managers. There use videos, which can be viewed when the manager has time. Their managers also participate in learning sessions, which are brief and allow the individuals to reflect and test their new skills on the job. They also use peer-to-peer feedback as one form of manager training. Cigna is encouraging idea and tactics sharing, as well as sharing mistakes.

DigitalOcean, a New York-based start-up focused on software, uses a full-time professional coach on site to help their managers to provide better feedback to employees, as well as develop internal coaching capabilities. They believe that if you experience good coaching, you become a better coach yourself. They also recognize the fact that all people are not suitable nor interested in coaching. Hence, everyone is not expected to engage in the coaching aspect. However, if one wants to achieve a managerial career at DigitalOcean, one is expected to obtain the coaching skills. (Cappelli & Tavis 2018, 49.)

A well-known company P&G is also involved in using the agile coaching practices. They want to make their manager's better coaches, as a part of a larger effort to rebuild training and development for the managers and enhance their role in the company. P&G has simplified their performance review process, which has resulted in the possibility to devote more time to employees' growth. P&G's culture has been quite traditional, which has caused them some challenges in transforming the supervisors from a role of a judge to a coach. (Cappelli & Tavis 2018, 49-50.)

If we consider why coaching and more importantly in this case sales coaching is so important? Siegfried (2010, 142) explains that effective sales coaching places the people in the middle of everything, where they should be. If the company teaches their sales team how to hold effective sales coaching discussions, it can results in them realizing the company go-to-market strategy. Coaching intends to get the best out of each sales professional. The challenge is that in case the coaching person is a super player, it might be difficult for the person to stand back when for example the sales call does not go as it is supposed to.

The following skills are essential in coaching:

- "Communication skills
- Managing interpersonal dynamics
- Critical thinking skills
- Time management skills"

(Siegfried 2010, 143.)

Siegfried (2010, 144) presents three key elements in sales coaching that the sales managers should display. In case they lack one of these aspects, it will reduce the effectiveness of coaching. These elements are illustrated in the figure below:

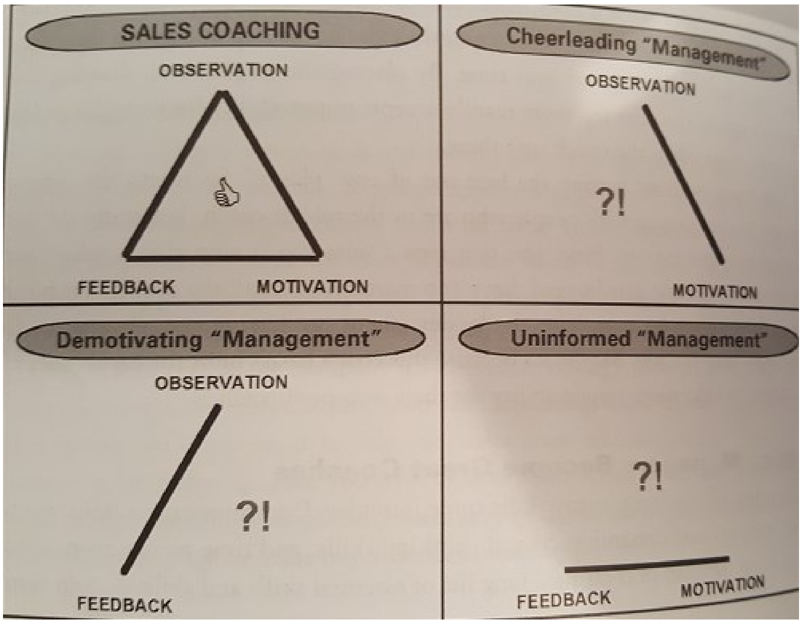

Figure 10: Anchor Points of Successful Sales Coaching (adapted from Siegfried 2010, 144.)

In the observation phase, the key aspect is naturally observing. This can mean that new sales rep shadows a more senior sales manager (or another way around) and observes the different actions during the day. It is important to differentiate the regular and irregular situations from each other, in order to understand what the important development aspects are. (Siegfried 2010, 145.)

Another aspect to consider is what motivates the sales people? It is not solely salary or bonus check. The internal motivations can be elements such as personal learning based on success, level of confidence the person possesses or the way person is “wired”. The company and upper management should help the sales managers to identify their internal motivation factors. Once the factors have been identified, the management should make sure they foster those factors. It can be done by creating an environment where both the sales team and manager can fulfil their internal motivations. (Siegfried 2010, 145-146.)

The feedback aspect could be both most important and most difficult in the equation. The feedback should be given in a way to make the sales team to really listed to and also make sure they do not get too offended, which might affect their motivation. Naturally, the constructive feedback also arises from the mistakes. The management and coach just have to be clever enough to present it in the form of helping the person to grow. (Siegfried 2010, 147.)

Jones & Gorell (2014, 11) mention that coaching is the notion of empowerment. The new hires will take the responsibility of their own learning and progress. Maybe the time is finally here, when people are ready to let go of the negative feelings associated with coaching and learn to embrace it. The coaching culture is created though empowerment and spreading coaching to every level. In case that stage is reached, the coaching becomes a development tool that covers each part of the employee lifecycle.

As a conclusion, there are a couple of elements rising from the literature, which seem to contribute in successful onboarding. The organization’s expectations and practical elements related to the new role should be made clear to the new employee. Tools and equipment should be ready and functioning when the new employee starts on the job. Social integration and company’s culture are important elements to open up in order to make the new employee feel at home. New ways of handling the onboarding are being developed. Mentoring is clearly one rising element, which companies are starting to use more and more. Finally, onboarding is and should be a process.

4.6 Key factors to achive a functional onboarding process in this study

The author has covered five key concepts of onboarding in the literature review chapters 4.1 to 4.5. The studied concepts are onboarding vs. orientation, the importance of onboarding, onboarding strategies, onboarding the sales personnel and the successful onboarding practices. The author had some kind of an idea of the literature needed based on the initial impression and first phase of data collection. However, the author feels that she was able to gain much deeper knowledge on the topic through the literature review. The literature review is the basis for the second phase of the data collection. In order to move on to the next phase of the research, the author has created the below conceptual framework for the study.

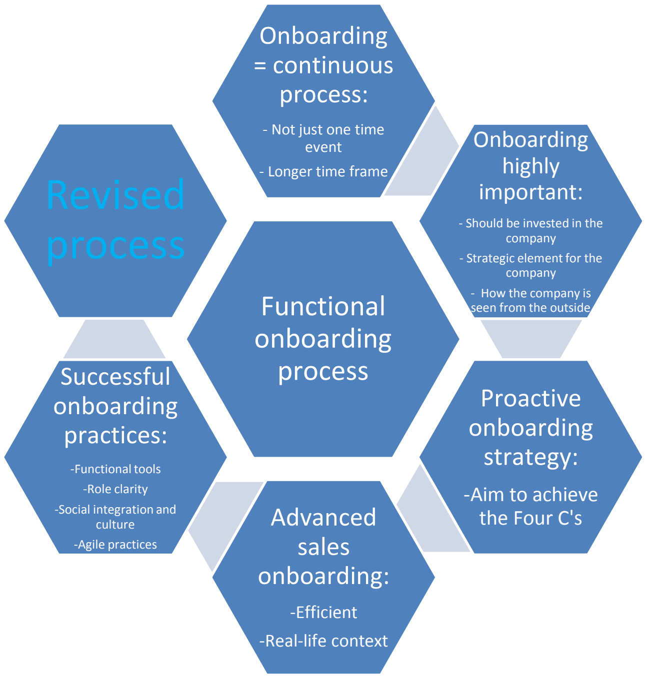

Figure 11: Conceptual framework for the study (designed by author)

5 Research Results and Findings of Company X's Sales Professional Interviews

This chapter covers the results of company X's sales professional interviews. The theme interview topics and questions are covered from chapter 5.2 to chapter 5.4. The first theme covered the onboarding process at company X. The questions aimed to discover how the interviewees felt about the current general onboarding vs. sales onboarding and what are the possible challenges in the process currently. The second theme concentrated on the learning material and support. The author wanted to find out how the interviewees felt about the current learning material. The questions also aimed to open up what kind support the sales professional would need during the onboarding. The last theme aimed to explore what kind of proposals the sales professionals would have in terms of improved or agile onboarding methods.

The detailed interview questions can be found in the appendix 5.

5.1 Main interview round demographics and interview methods

The interviewees were selected in cooperation with company X's thesis tutor and another HR manager. In order to keep the anonymity of the interviewees and in return receive the best possible results, the author decided not to not disclose the detailed countries/locations of the selected individuals. The turnover of new sales professionals is rather low at company X's scale based on the company size, which would make the selected individuals easily recognizable. The sample consists of new sales professionals in both Y and Z Business Areas, 11 persons in total. The original selected sample size was 12 sales professionals. However, one person could not attend.

The interviewees are spread globally across the company as follows: Europe, Middle East & Africa (EMEA), Americas (North, Central and South America) and Asia Pacific (APAC). The regional division that the author has presented does not necessarily go hand in hand with the current company X's Y and Z Business Areas organizations. The author feels that this type of rather generic division was needed to maintain the anonymity of the interviewees. The author named the interviewees as sales professionals, because the actual title of the selected individuals varies from sales manager to other related ones.

The majority of the interviewees had worked less than ten months for the company at the time of the interview. A couple of sales professionals had been on board slightly longer. The interview sample contained one internal transfer, meaning that the person had transferred to sales from another position in house.

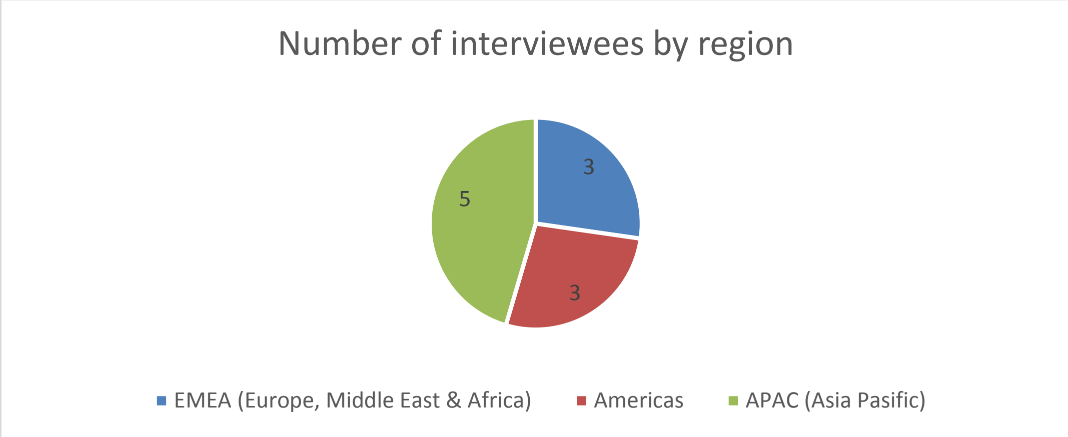

Figure 12: Number of interviewees per region

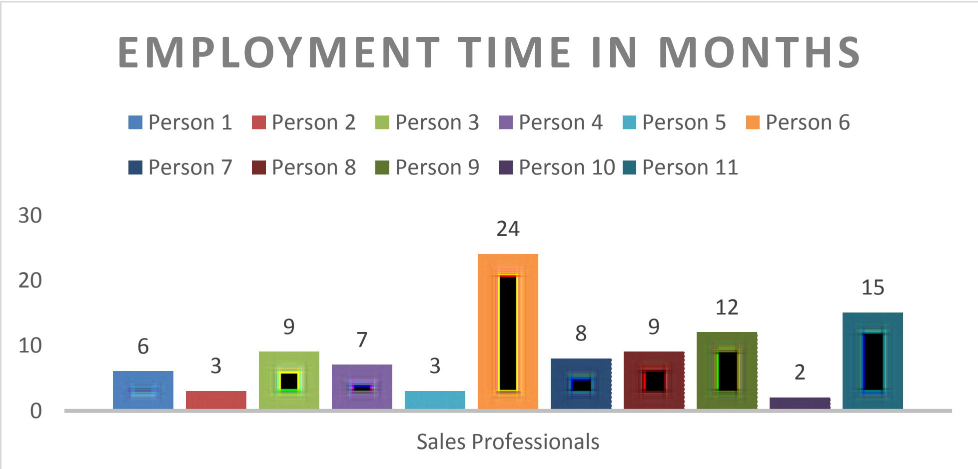

Figure 13: Employment time of the sales professionals in months

The interviews were conducted during 14-29 June 2018 via Skype for Business online tool. Skype was chosen as it is a familiar tool for all the company X's staff, which eliminates the possibility of tool errors and in general guarantees the efficient use of time. Skype online also contains a recording function. The author wanted to make sure that the interview data is carefully stored and easily accessible for analysing purposes during the thesis process. Finally, Skype has a sharing functionality, which enabled the sharing of the needed interview content.

One hour had been reserved for each interview. The interviews lasted from 25 minutes up to 1.5 hours, 30 minutes being the rough average. The author was on study leave at the time of the interviews; hence, she was able to allocate additional time to each interview, if needed. One interviewee out of eleven decided that the online Skype interview would be too challenging for the person due to lack of sufficient English skills. Thus, the person answered to all the interview questions in written form in the interview questions sheet. In order to guarantee the validity of the results and correct understanding, the author proposed to have a Skype chat on the originally chosen interview date. The author reviewed the answers per each question and asked clarifications when needed via the Skype chat. The chosen interview method was half-structured theme interview, which provided a clear frame for the interviews. However, the method left the author the freedom to guide the interviews to the needed directions and enabled asking additional questions.

5.2 The current state of company X’s sales onboarding process

The results of the 11 Skype interviews were gathered and analysed. The analysing was done by re-listening the interview recordings and verifying that the notes done by the author during the interviews matched with the recordings. The data gathered confirmed the need for this study and it also corresponded with the first phase Vice President interview data. Based on the interview data, the author was able to identify the following key issues arising from all the interviews.

Similarly as the Vice Presidents, the sales professionals also confirmed that everything works rather well in general level, but company X does not have an official onboarding package for the sales. When the author asked about the onboarding to the sales role, one of the comments was as follows: “It did not go as smoothly as the basic orientation/onboarding”. The author was able to identify the below issues under general onboarding and sales onboarding rising from all the interviews.

General onboarding

The sales professionals feel that the onboarding/orientation works rather well on general level. Either the line manager or colleague in the same location gave the new employee the introduction and support at the beginning stages. For example, the sales persons answered that “a regional manager guided me through the process and gave an introduction of company X” and “There was no official onboarding process, but my supervisor supported and guided me during the process and was very willing to help”. It was also mentioned that “the process was disorganized and slow for setting up my IT accounts” and “HR directed me to the online part of YY (company X’s Intranet), where the procedures are, but they did not really follow-up on that. Unlike my previous job, where I had to complete an introduction course”.

Some of the interviewees were able to attend an orientation/sales meeting shortly after their arrival. A person was able to attend a two weeks orientation/training process at company X's headquarters in Finland already in the starting month, "I spent two weeks having trainings regarding all the different products, sales process, sales tools and face-to-face meetings". The orientation for the sales person does not necessarily take place or have to take place at the company X's Finland headquarters. The orientation location depends on the business segment/locations and how the business is organized in the area in question. The face-to-face meetings in the beginning were considered very useful e.g. at a sales meeting. One of the interviewees stated that

> "I was able to familiarize myself with the sales team in the region, as well as to the distributors at the distributor meeting. Even though the visit did not contain product training and sales training as such, but it was very useful to have the face-to-face contact with colleagues and customers."

Sales onboarding

The interviewees felt that onboarding for the actual sales role was inadequate and company X does not have an onboarding package/process for the sales. One of the interviewee commented as follows: "I was thrown into the water and I had to learn to swim." The interviewees were collectively giving credit to their colleagues and managers. They stated that "my colleagues did the best they could to assist me".

As the sales professionals generally had long experience in similar types of sales roles, they felt that the actual sales work is not the issue. Company X's products and markets were not familiar to many of the new sales professionals, which means that a certain amount of time is needed to familiarize with the business. The sales professionals started to perform their actual job right away and were on full speed within a couple of months. However, there were comments such as "The supervisor did not completely understand how long it takes to familiarize with the technical information." and

> "My background was in a totally different business, which meant that the products and customers were new to me. The general feeling in the beginning was 'start selling'. For me it is important first to gain the confidence regarding the products and systems prior actually going to the customers. I do not want to embarrass myself nor company X in the situation. I assumed that the process would have been handled a bit differently."

The interview data clearly indicated that a more structured process for the sales role onboarding would be needed. The interviewees also mentioned that some kind of a starting package for the sales person would be helpful. It could contain instructions on the tools, processes and company X's way of doing things. Even though the tools seem to be generally working, there were challenges in getting the correct access rights for the tools and also training of the tools, such as company X's ERP operating system did not seem systematic. There interviewees mentioned that "there was no formal ERP training, except from the immediate colleagues". The author feels that it would be important to understand that it takes time to get fully on board and see the big picture of the company's operations. As an interviewee also stated, "The actual learning curve is roughly six months and it takes one year to dig deeper into the customers' issues."

If we consider onboarding from the perspective of human resource development, we are leaning towards organizations that possess strong learning culture. The author feels that company X is moving towards a learning culture organization, but it is definitely not there yet. Both general HRD activities and onboarding activities require top management's support as well as line managers' commitment and involvement in the process. (Pilbeam & Corbridge 2010, 361-362.)

The below figure shows the author's view of company X's current state regarding the strategic HRD. As the top management already confirmed in the first phase of the data collection, onboarding is one of the strategic actions for the company and it is important to develop the process.

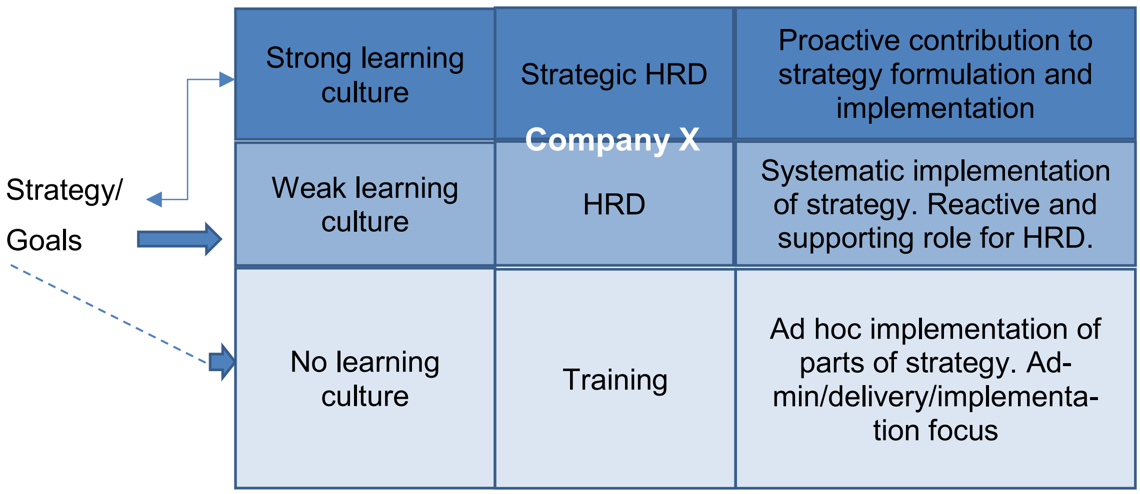

Figure 14: From training to strategic HRD: a developmental model McCracken & Wallace (2000 adapter from Pilbeam & Corbridge 2010, 362.)

5.3 Analysis of the main challenges in the company X's sales onboarding

This sub-chapter covers the main challenges the interviewees raised regarding the current state of company X's sales onboarding practices. All the interviewees clearly stated that the lack of defined sales onboarding process brings many challenges. Naturally, this means that the new employees may have difficulties in understanding the bigger organizational picture sales wise. The employees had the feeling that "after the beginning stage introductions, it was assumed that I understood everything". The lack of structure in the onboarding phase meant that the employees had to be very independent and active in the learning process.

Support and mentoring

One of the clear challenges from the sales professionals' point of view was the distance from the head office. The interviewees felt that it is not always easy to get in touch with the relevant stakeholders in the headquarters and in some cases in some other key locations. The interviewees mentioned that "learning sessions with application managers would have been needed" and "in addition to the original info sessions with the product managers, some kind of second phase sessions would have been useful". The problem seems to be that it is highly challenging to absorb all the technical and product related information in a short time and be convincing towards the customer. Company X's customers tend to have a lot of insight knowledge of the company X's products, as the interviewees also pointed out. This means that in order to perform and nail the sales case, the sales professionals should be given all the needed support from the company's side.

As it was pointed out, due to "the busy nature of the sales role", there is often not much time for support. The element of coaching was raised in majority of the interviews. People considered that it would be very useful to have a dedicated mentor available from the starting phases of the onboarding. This would give the new employee the permission to ask additional questions and to interrupt the colleague's daily work. The author feels that certain cultural elements also play a role in the process. Some people might consider it difficult to approach a foreign colleague, especially if the persons have not met face-to-face. In case there would be a mentor/buddy available, it would probably ease the barrier of contacting the other stakeholders.

Process, training and tools

There was some variance regarding the interviewees on what type of orientation they had experienced. However, it is clear for the author that the sales professionals would need a proper orientation and guidance in the beginning phases of the sales onboarding. One of the interviewees stated the following: “The onboarding process was quite weird, as I was alone. They told me everything is in YY (Company X’s intranet), but actually for my segment, nothing is in YY.”

The aspect of language training was also raised in the interviews. The company language at company X is English. However, there are also other language needs depending on the region. It is a one thing to speak a language, but another issue is whether you can use the relevant business language. Due to the technical nature of company X’s business and products, it takes some time to learn the correct phrases and terminology related to the products. “The language training need was discussed in the onboarding phase”, one of the interviewees commented.

Another clear challenge based on the interview data, seems to be the tools and adequate training for them. As one of the interviewee pointed out, “company X’s ERP system is not the most user friendly” and it requires certain amount of formal training, as naturally all the similar operating systems. The author’s general feeling based on the interviews was that there is not any formal tool training offered to each new employee. Some of the interviewees visited company X’s headquarters or some other key locations for their business, which seemed to provide a window for the face-to-face tool training. However, many of the interviewees had to rely solely on their colleagues and supervisors when learning to use the system. In general, the sales professionals experienced certain difficulties in getting the tools to function and receiving the access rights for programs etc.

Mastering the technical aspects

Last main challenge raised was the technical aspect and challenge to absorb all the relevant information in a short amount of time. During the interviews, it was stated that “I had to be a product expert for our new distributors, when I did not even have the necessary qualifications in regards to our products.” and “The main challenge is to absorb and master so much new knowledge and process it in a short time”.

5.4 Support actions needed during company X’s sales orientation period

To the author’s delight, the sales professionals pointed out similar issues in terms of the needed support actions. Thus, it is easy to combine the main elements based on the similarity. Many of these elements were already discussed in sub-chapters 5.2 and 5.3. Here are a few examples of the comments regarding the needed supporting actions:

- Open minded colleagues, who are willing to share information and material about the local customers and markets.
- Good support from the team
- Mentoring/coaching
- Line Manager’s support
- More time allocated for the company internal stakeholder meetings
- Start-up package for the sales person
- Tools support
- Product training (application & product management’s support)
- Customer account management system (which company X’s products/systems the customer has in use)
- What is the company X’s way of selling: pricing, value, product benefits compared to the competitors, success story presentations

Based on the interviews, the general reception in each sales team/business segment seemed to be friendly and welcoming. The interviewees clearly felt that further coaching/mentoring would be needed. Even though mentoring is not officially established method in company X’s sales onboarding practices, the author would say that mentoring/coaching happens every day. As one of the interviewee commented, “Without the support from the immediate colleagues, the whole process would have not worked. They were an important support system in the beginning phases of the orientation and they still are to some extent.” Another comment was that “the sales person needs both mental and practical support in the beginning phases of the onboarding”.

It was also pointed out that the line manager’s support is important. An interviewee said that, “I am selling to countries, which have totally different cultures than what we are used to. It would be great, if there would be a senior sales colleague/coaching person available in the area to clarify both sales culture and general culture related aspects.” Currently the line manager is highly involved in the day-to-day business in the area in question, and thus is able to act as the mentor himself. It is naturally up to the sales team in question, who they would like to nominate as the mentor. In certain geographical areas, it is more crucial for the line manager to be highly involved in the day-to-day business. However, in case there would be a mentor colleague available to take care of part of the onboarding, it would release the line manager’s time to concentrate on the sales management and leadership aspects.

The product training was raised as an important development aspect and it was commented that, “the product management’s support was quite minimal and it was assumed that I already knew a lot”. The sales professionals would like to see active involvement from the product/application management. “It would benefit everyone, if the sales guy would digest the new area as soon as possible. The product manager has the insight knowledge of the frequently asked questions by other sales professionals etc.”

The interviewees also addressed the selling aspect, asking what is the company X’s way of selling. What are the value selling arguments for the products and systems? What are the benefits compared to the competitors’ products? “The more you speak with the client, the more they are going to compare you with the competitors. Thus, you should be aware of the pricing and value of the products compared to the competitors. Another thing is how our product is creating value for the customer.” The sales professionals would like to receive further information on the customers, which company X’s products they have etc. Hence, they proposed that some kind of an account management system would be very useful.

The tools training in general is clearly one important development aspect. It was pointed out that, “The part numbers are very confusing, when you want to quote something”. Based on the interviews, there seems to be minimal official training for company X’s ERP system. From the sales person’s point of view, the quoting side is naturally the most important element. Thus, it is obvious that some sort of official company level training should be provided and the training should not be solely on the colleagues shoulders. Naturally, the colleagues who have used the quoting tool for several years are the experts in the matter. However, the author feels that some kind of general upper level introduction on the operating system would be needed first.

Finally, it all comes down to the process or the lack of it. The interviewees would like to see a visual process available for example in the company X’s eLearning environment. Some of the interviewees had used eLearning a lot and some of them not so much. However, the key issue seems to be that it is not compulsory. Whenever, something is not mandatory, it is easier to bypass it. “If we could prepare some onboarding specific eLearning material that would be helpful”, said one of the interviewees.

5.5 How to achieve a functional sales onboarding process for company X

In order to answer the question how to achieve a functional sales onboarding process for company X, we must answer the main research question. The main research question was: How to improve the onboarding process of company X's sales personnel in order to speed up the process, increase efficiency and create cost savings? The research results confirmed the importance of the onboarding. As the Vice Presidents stated, it is a strategic action for the company. It also gives the first impression of the company, after recruitment, for the new employee. Depending on how well the onboarding process is handled, it might be the deciding factor for the employee to either commit to the company or decide to leave.

This study clearly indicated that there is a need for official sales onboarding process at company X. As BirdDogHR (2017), Lawson (2018) and Lewkovich state, onboarding is a process. Bauer, Bodner, Erdogan, Truxillo & Tucker (2007, 707) speak about the organizational socialization during which the employees become organizational insiders. Kauhanen's study (2017, 35) indicates that when the employees had received a planned onboarding, they considered their on-the-job training had been more effective. Her study scope did not contain solely sales personnel though. Company X's sales managers felt that the lack of defined sales onboarding process hindered their onboarding to the new role.

The author has observed company X's sales professionals and some of their challenges while working in close cooperation with the sales. The author can agree with the sales professionals' comments related to the difficulties in getting in touch with the head office or finding the correct information sometimes. A mentor/buddy could help to facilitate the onboarding process especially in the beginning stages. The sales professionals seemed to be open to the idea of mentoring. As Cappelli and Tavis (2018, 49) explain, the companies that are the forerunners of agile talent practices invest in sharpening their managers' coaching skills. Mentoring should be presented as an acceptable part of the onboarding process. That would open the communication channel between the new employee and mentor. The mentor/buddy would also have the approval from the management to devote time for mentoring.

The sales person is expected to be confident, as Bellows (2017) writes. However, how is the sales professional able to show confidence, in case he/she does not have sufficient knowledge of the products and the way the company wants to sell them? Company X's operating environment is highly technical and the customers are also often times experienced experts in using company X's equipment. Hence, it can be a challenging for the new sales professional to gain the needed knowledge in the products and systems, in order to be convincing towards the customer. Thus, better support from the product management during the onboarding process would be needed.

Sales competence development was raised in both of the interview rounds and is clearly seen an important development element. As it was pointed out in the chapter 2.5, company X has already done certain development actions in the form of XX training at Business Area Y. Based on the interviews, it is indeed important to develop the sales competence and clarify what is the company X's way of selling. Growth Engineering (2018) points out that in case a company wants to have a certain sales skills and behaviours, they need to know what the sales professionals' competencies are and how they should be improved. A sales competency framework can be a useful tool to tackle that.

The cultural and social integration of the new employee is extremely important. Bauer (2010, 5-6) speaks about social integration and Karambelkar and Bhattacharya (2017, 5) awareness of introducing the company culture to the new employee. The interviewees wished that the colleagues would be open-minded to share information about the customers and markets. In general, a good support from the team was requested.

Lastly, when considering the reliability and validity of this data collection portion, the author noticed a few elements that may have affected on the results. The majority of the interviewees seemed to be open and honest in their responses. However, some interviewees were clearly a bit cautious in giving any kind of constructive criticism. This is most likely a culture related issue. The author was prepared for that. She aimed to tackle the issue by reassuring that all the interviews are confidential and that she will not disclose anyone's identity in the study. Some interviewees also struggled a bit with the language barrier. The interviewer tried to facilitate the situation as much as possible and tried to clarify the matter whenever needed. In the end, the author considers the study reliable and valid, because repetition in the results could be clearly identified. The interview results correlated between both interview rounds, as well as the literature review results.

6 Implementing a Functional and Revised Sales Onboarding Process for Company X

This chapter presents the implementation workshops done as the final part of the data collection of this study. First action point after the data collection and analysis was the implementation planning workshop between company X's thesis tutor and author. The implementation workshops took place in two different sessions due to scheduling issues. They started the second cycle of this action research.

6.1 Implementation planning workshop

The author felt that it was important to have some kind of workshop with the thesis tutor, prior the actual implementation workshops. Even though the author had a lot of material based on the interview data and theory to support it, the author wanted to hear how company X's HR saw the results. The author considered this the only way to be able to produce a relevant result with HR's support and approval.

The workshop was held on 13 September and it lasted for two hours. During the workshop, the author presented the research results. The author had already presented part of the results during the thesis process, but now the final results of the data collection were available. The thesis tutor and author discussed about the improvement actions needed. The below figure about the needed new Starting point evaluation was drafted.

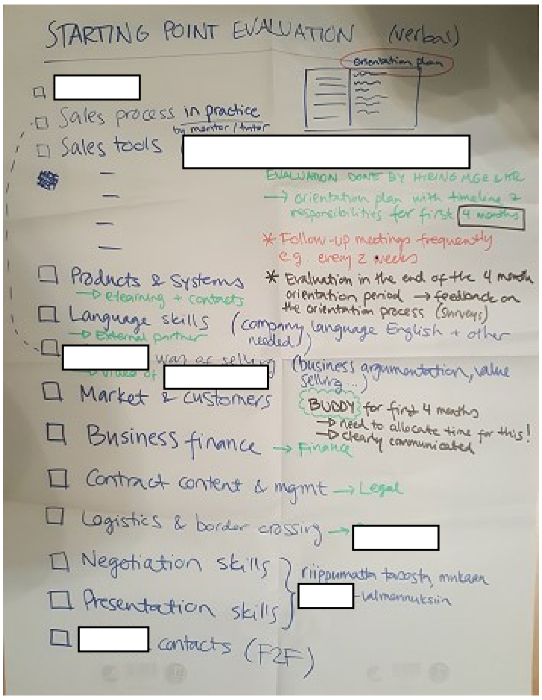

Figure 15: Thesis implementation planning workshop: Starting point evaluation

Based on this workshop, a conclusion was that some kind of starting point evaluation would be needed. It is not included in the current practices. The starting point evaluation would take place after the recruitment. The hiring manager and HR would conduct the evaluation. General skills and training requirements would be covered in the meeting, e.g. product training, language training, practical tools training. After the evaluation, the hiring manager would organize a meeting with the new employee. They would discuss about the needed trainings and support for the individual in question. Based on the discussion, a personal onboarding plan would be drafted.

The individual onboarding plan would contain the timeline and responsibilities for the first four months of onboarding. The hiring manager would be in charge of the four-month onboarding period, which is generally more or less the probationary period. Follow-up meetings should be held frequently, e.g. every two weeks. A buddy/mentor colleague should be assigned to support the new employee, with the approval and relevant time allocation given by the hiring manager. Finally, at the end of the four-month period, an evaluation would take place. This is currently already the phase, where HR sends the new employee an orientation process feedback survey. In this stage, the new employee's onboarding status would be evaluated and further development actions would be decided.

After the four-month period, the initial onboarding phase would be over. The ownership of the process would move on to the new employee. The hiring manager would naturally be involved in the process, but now the new employee would take the driver's seat. The mentor/buddy would not be as active in the process as in the beginning. However, some involvement would surely be needed. Follow-up meetings with the line manager should be continued. The frequency could be determined based on the need and preference of the individual. Once the onboarding period of 5 to 12 months would be achieved, a one-year evaluation would take place. The status of the onboarding and its outcome would be covered in the evaluation.

6.2 Implementation workshop 1: Sales Professionals

The first thesis implementation workshop took place on 25 September. The author had already confirmed the other sales professional attending the workshop that no prior preparation is needed. The sales person in question is an internal transfer in the company and the person has been in the current sales role for roughly one year. As the other sales professional participating in the workshop already attended the second interview round, the basic idea behind the workshop was familiar to the person. The author started the workshop by presenting the background of the thesis and the main findings based on the data collection.

After the basic introduction, the author moved on to presenting the revised process. The starting point evaluation proposal was presented and the new timeline and related content for the events during the first four months of the onboarding was covered.

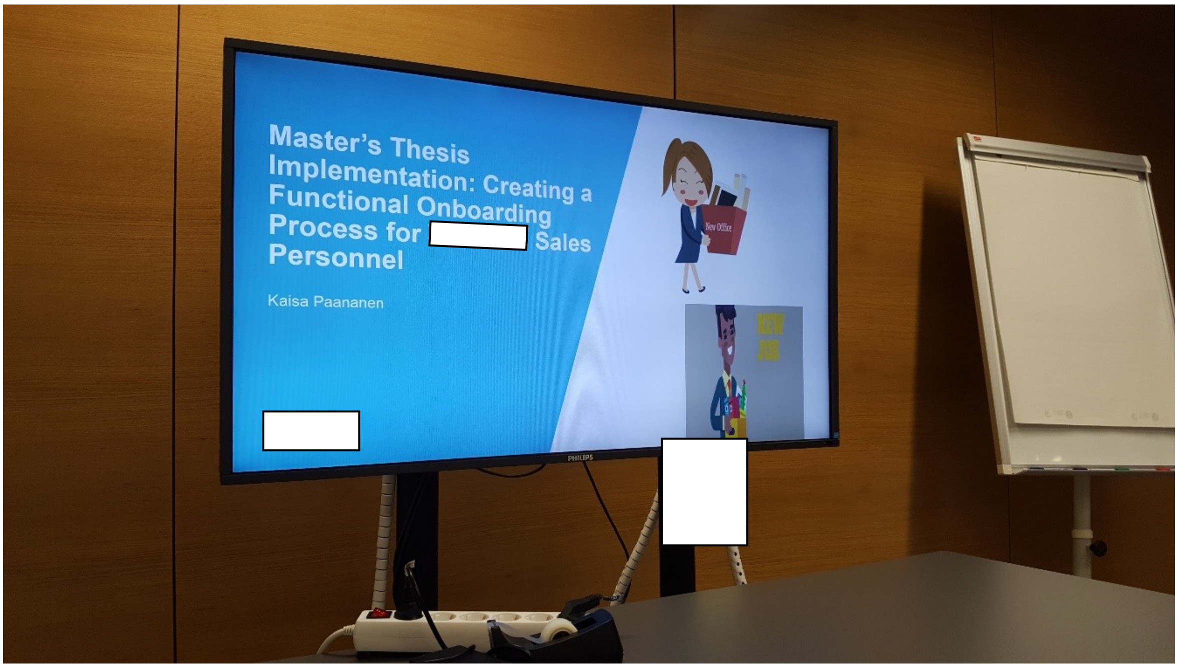

Figure 16: Thesis implementation workshop 1 (designed by author)

Finally, the second part, 5-12 months of the onboarding, of the new onboarding process was covered. The author encouraged the participants to ask questions and express comments during the presentation whenever needed. The overall response from the sales professionals was extremely positive. To some surprise of both the thesis tutor and author, the sales professionals agreed with the proposal as a whole. The main points raised in the workshop are illustrated in the figure below.

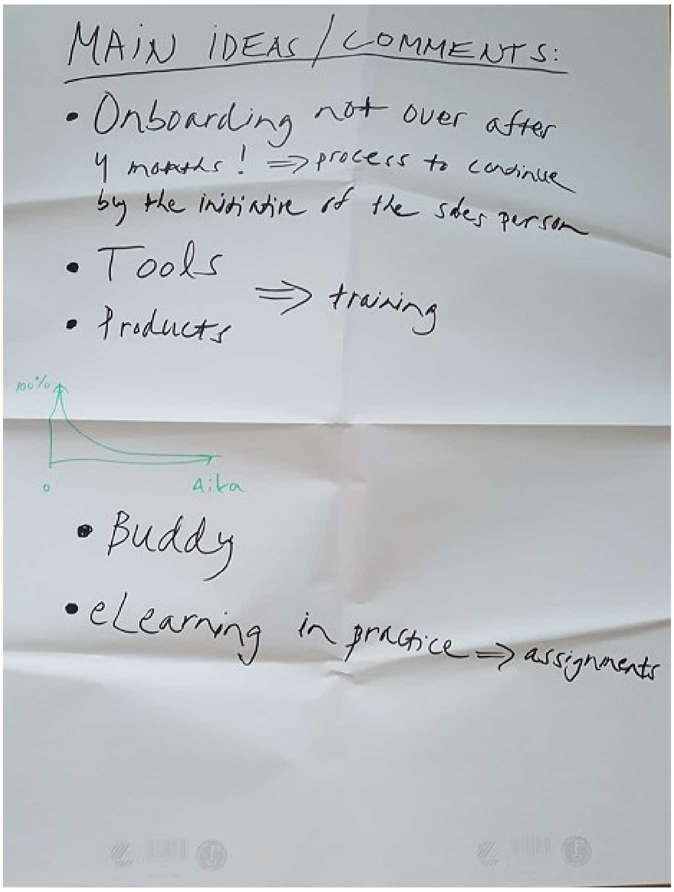

Figure 17: Implementation workshop 1: main findings

The sales professionals felt that the initial onboarding phase of 4 months is quite short and they wanted to emphasize that the learning process is by no means over at this stage. The common opinion was that the process would continue by the initiative of the sales person as planned and suggested in the revised process proposal. The workshop participants considered the tools and product training an important topic, which should be highlighted in the new process. They proposed that company X’s eLearning, or whatever tool the future learning tool will be, would contain real-life assignments. The real-life assignments would help the sales person to practice his/her knowledge with actual cases. The author thinks that this was an excellent idea and something that should be rather easy to execute in the learning environment. This method would also provide the managers a means to follow-up and in some extend measure the learning of the new sales reps.

The idea of a buddy/mentoring colleague was also received positively. The sales professionals did not oppose the idea and seemed to be onboard of acting as the buddies themselves in the future if needed. The author emphasized that in that case, time allocation should done by the manager to make sure the person has enough time to devote to the process.

6.3 Implementation workshop 2: Head of sales team/area in question

Finally, after some scheduling challenges, the second part of the implementation workshop took place on 8 October. The head of particular sales team/area was able to participate in this workshop along with thesis tutor and author. The setup of the workshop was different, as it was done via Skype Online tool. The author was wondering what kind of response the sales team head would give, as he had not been part of the project until now.

The author gave the presentation similarly as at the first workshop. The idea of this workshop was to get also the manager’s take on the matter. The manager pointed out that the challenge in this revised process is how to prioritize the issues. He mentioned that people are different in how they learn and the challenge is to recognize the most critical development aspects for the person in question. Once the most critical learning development aspects have been recognized, they have to be executed as well. The manager was not opposed to the mentoring proposal and just commented that the person should work in the same regional area as the new employee, i.e. in the same sales team.

6.4 Implementation summary

The implementation process proved to be a successful effort as a whole. The new process proposal was well received amongst the workshop participants and the content seemed to be relevant in real-life. The sales professionals emphasized that the sales onboarding process needs to continue after the initial four-month period, because the time period is not sufficient for comprehensive onboarding. The sales professionals considered tools and product training to be an important element of the onboarding process. They proposed that eLearning environment could contain certain interactive assignments for the employees to test their knowledge. The sales professionals supported the mentoring proposal and did not oppose to act as a mentor themselves in the future.

The head of sales team/area responded well to the proposal. He thought that the challenge might be how to prioritize and recognize the most critical learning aspects for the person in question. People are different and act differently, which means that same agenda does not suit for everyone. The head of sales team considered the mentoring a good idea, but emphasized that the mentor/buddy should work in the same regional area as the new employee.

7 Conclusions

This chapter concludes this research project. It reminds what the original research objectives were and covers the research achievements. Future development actions at company X will also be covered, as well as author's own recommendations regarding the development of company X's sales onboarding process. Finally, the author will open up and evaluate her own learning process during this research project.

7.1 Research objectives and achievements

The main research question of this study was: How to improve the onboarding process of company X's sales personnel in order to speed up the process, increase efficiency and create cost savings? In order to answer that question, the author needed to gain answers to the related sub questions.

Firstly, the author wanted to find out how the sales onboarding process is currently working at company X. The research showed that the general onboarding process is going rather smoothly. The interviewees did face some tools and equipment related challenges in the beginning. However, the main point rising from the study was that a specific sales onboarding process is missing. Bauer (2010, 2) speaks about the compliance, clarification, culture and connection, which determine where the company is in terms of the onboarding process. The author feels that company X is currently in the high potential onboarding stage in terms of the sales onboarding. Company X clearly wants to move towards the proactive sales onboarding. Not many companies are there yet, but the author feels that it will be the future trend.

Next, the author wanted to discover the main challenges and reasons behind them in the sales onboarding process. Cappelli and Tavis (2018, 49) explain that those companies who want to be more agile in their onboarding practices use coaching as a tool. Siegfried (2010, 142) also explains that coaching makes people the centre point of the process. Jones & Gorell (2014, 11) mention that coaching is the notion of empowerment. The author thinks that these are wise words. It all starts and ends from the people and how they are treated during the process.

Company X clearly appreciates the people, as they are willing to develop the sales onboarding process. The new sales onboarding process contains the coaching/mentoring element. There will be a named buddy for the new sales professional to support them especially during the first four months of employment. The line manager will also be actively involved in the process. The new sales onboarding process will last the whole first year of the employment. As the figure 9 on chapter 5.2 illustrates, the author thinks that Company X is moving towards strategic HRD with the development actions done based on this study.

The sales professionals felt that they needed more support in terms of tools and processes. In addition, they requested better technical training and support. The new onboarding process aims to tackle these issues by first representing a visual sales onboarding process in the eLearning tool. There the employees are able to follow up the process themselves and check how they are progressing. The tool is supposed to contain both practical and technical material, which can be utilized efficiently during the learning process. The current tool already contains a lot of material, hence now some work is required to combine and organize the material in a clear manner.

The author sees many connections with the new company X's sales onboarding process to Karambelkar and Bhattacharya's (2017, 5) change management model ADKAR. Company X is aware of the importance of what kind of impression the company gives to the new employees. They also want to make sure the new employee has the knowledge of needed tools and processes in order to function in the company. The line manager also needs to make sure the new employee is aware of what is expected from them. Once the process is well planned from the start, the author feels that the knowledge building will also start faster. In the end if the process is successful, the new employee should have the ability to function as a regular employee in the company. Well-organized process generally boosts the employees' commitment with the company. Both Bauer (2010, 16) and Bortz (2017/2018, 45) second the structured process in terms of getting the employees immediately engaged with the company.

The next research question aimed to cover what help and support the new employee and line manager would need during the orientation period. Both interview rounds confirmed the early mentioned need for a proper sales onboarding process. The aspect of mentoring has already been covered, as well as the tools support and other training needs. In addition to already mentioned product training, the interviewees mentioned the aspect of language training. The starting point evaluation in the beginning of the process and detailed personal onboarding plan will cover all the needed training aspects in the future. The status check at the end of the first year will also serve as a means to check what are the further training needs for the employee in question.

The buddy will hopefully ease the communication gap between different locations and assure that the needed stakeholder meetings take place as regularly as needed. The new process aims to ease the line manager's workload in terms making the sales onboarding process visual in the eLearning environment for the manager as well. Valenti (2016) and Xactly Media (2017) state that it is important for the management to be able to follow the progress of the sales reps. This way they can also observe in case some problems arise and find a solution for them.

The issue of company X's way of selling was raised in both of the interview founds. Company X's Business Area Y has already done actions on that front already in the form of XX training. Those development actions need to continue also in the future and make sure both business areas are working towards improving the sales competence. Valenti (2016) and Battaglia (2017) point out that the sales reps need to learn in a real-life situation and not just at a classroom setting. Weiss (2015) emphasized the importance of the product training, but he also considers sales and negotiation skills important. Company X could use the real-life set-up after the basic training session and product trainings have been held. A senior sales rep could take the new employee with them to a customer visit or meeting.

To conclude, the improvement actions needed are an official sales onboarding process, which will be visible in the new eLearning environment, a starting point evaluation and personal onboarding plan. The personal onboarding plan will determine the detailed information included in this person's eLearning environment. There will be some kind of basic company information available, as currently. Certain process, legal and security related information packages will be included in the tool as well. However, probably the most important aspect to consider is the sales related information. What is the main information package in terms of technical and product related information that this employee needs. In sales, time is money, so there is no point for all the sales reps to browse through all the company X's products and systems related material. It would not even be possible, as the variety is so large.

Finally, to answer the question: How to improve the onboarding process of company X's sales personnel in order to speed up the process, increase efficiency and create cost savings? The author believes that the new sales onboarding process will be highly beneficial for company X. With the help of the new process, the individual sales professionals and line managers do not have to waste time and money in searching the correct information. The visual onboarding process will guide them through more efficiently. The mentoring aspect will help the new employees to connect with the company's culture and people faster and in the end, it will make them more committed to the company. In the bigger picture, company X will give a good impression to the new sales professionals already in the beginning stages of the process, which will reinforce the commitment and reduce turnover.

7.2 Future actions at company X and author's recommendations

The overall response at both of the workshops was positive and the common opinion was that the new process can and should be implemented in real-life. The team manager and thesis tutor, who is the HR manager for the business area, decided at the workshop that they will already go ahead and test this revised process with a new employee. A new sales person is just joining the sales team in question. Hence, this is the perfect timing to start following the revised onboarding process.

The new sales person is an internal transfer, who has worked in the company for several years in a different position. The manager and HR manager's plan was to test and use the new proposal of the personal onboarding plan for the new sales person. This phase is not anymore in the scope of this study, but it would be interesting to hear the outcome.

What comes to the future development of the process, there will be a new eLearning tool available at some point next year. The approval for the tool has been given, but the planning process is still ongoing. The current estimate of the schedule is that the tool would be ready by summer 2019. There is a good opportunity now to also engage this study into the tool development. A new tool provides always new opportunities regarding the development environment in general and the author hopes that there will be a possibility to contribute to the tool development from this perspective.

The author is not able to continue the development work of this study, as she is heading towards new challenges in another company in mid-November. However, the author's hope is that this study will actually benefit the sales professionals and managers during the onboarding phase. The author feels that now that the process is clear in the participants' minds, it should be launched and presented for the management. As the study already has the top management's approval, it should be "an easy process" to sell the idea further and continue developing the process.

The author had a further session with the HR Manager, who also acted as the thesis tutor, another HR Manager from Business Area Z and a HR Coordinator, who will continue to develop the process in the eLearning environment. The response was very positive and the new HR Coordinator seemed to be eager to continue the development process in the future. The author feels that the main challenge is to make sure the process will actually be launched in the eLearning environment and also from the management's perspective. The process should definitely be launched as official and compulsory, because that would obligate not only the new sales professionals, but also their line managers to get involved in the process. The author feels that this is the only way to get the process working in real-life.

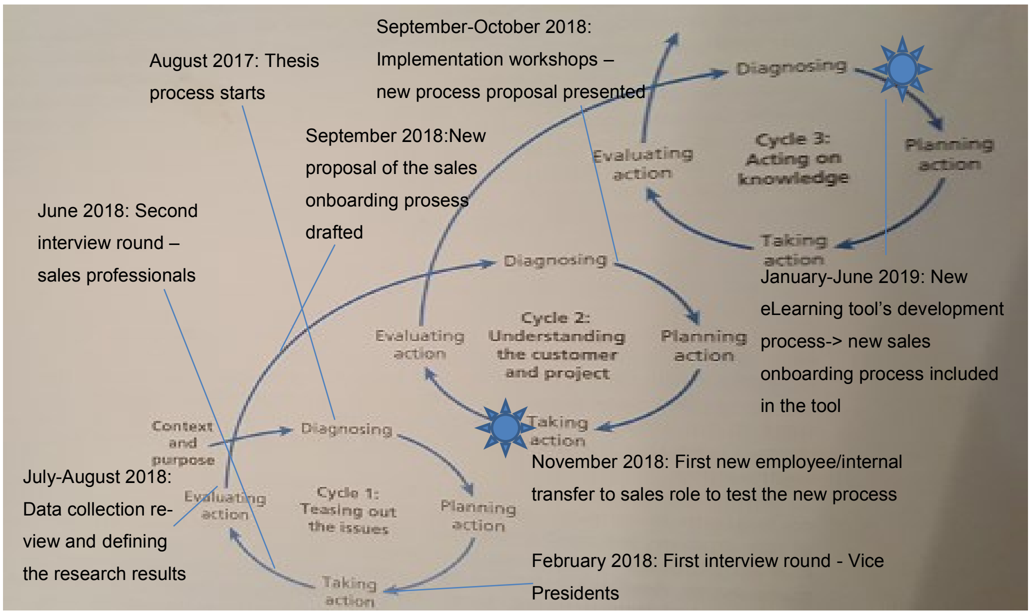

Figure 18: The status of the actions research at the end of the study (adapted from Saunders et. al 2016, 191)

7.3 Own learning

This research project has been a great learning experience for the author. It has been interesting to take the objective observer's view in some extend. As the author's own background and experience at company X is limited to Business Area Y, it was interesting to get to explore also Business Area Z's side in detail.

All the research participants had a positive approach on the thesis topic. The participants were interested in participating in the thesis process and ready to give their own input in the study. The author is very grateful for the open-minded approach she received from both the management and employee level.

When originally starting the thesis process, the author naturally wanted to achieve actual real-life solutions and improvements in the end of the study. Now the author can be happily confirm that the sponsor company seems to be very happy with the thesis results. The thesis has been able to produce a new process proposal i.e. a solution and improvement proposal for a real-life business problem.

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Appendices

Appendix 1. Company X's onboarding process prior the study - CONFIDENTIAL

(Company X 2018)

Appendix 2. First phase data collection: Interview invitation

Hello,

I am conducting a research for my Master's Thesis related to my MBA studies at Haaga-Helia University of Applied Sciences with the following topic: 'Developing the Onboarding Process of Company X's Sales Personnel'.

I have worked for Company X over eleven years in the field of delivery projects. In my current role, I am working as Project Coordinator at company X’s Business Area Y’s XX unit. During the years, I have both officially and unofficially guided and coached several people, including sales personnel, in both company X specific as well as commercial and logistics related issues. I have noticed that it can be challenging for a new sales person to familiarize him-/herself with all the details, especially in the project side. Thus, I am very interested to see how we could improve the process and I believe that my background will be beneficial in developing the process.

As we already have general company X’s onboarding practices and guidelines available, the purpose of this study is to concentrate on and develop the onboarding of our new sales personnel. This first interview round is conducted to find out how the topic is viewed in the business area level. The second round will be conducted in the sales manager level, with the emphasis on those who have joined company X within the previous year (or two, depending on the sample size).

In case this interview date/time is not suitable for you, kindly propose a new one. Please find attached the interview questions, in order for you to familiarize with the topic in advance.

Thank you in advance for your time to participate in my Master's Thesis process. Your answers are much appreciated.

Best regards

Kaisa Paananen

Student at Haaga-Helia University of Applied Sciences
Helsinki, Finland
Degree Programme in International Business Management (IBMA/MBA)

Supervisor of my study at company X:

XX
Human Resources Manager

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Kaisa Paananen | Project Coordinator
Company X
xx

Appendix 3. First phase data collection: Interview questions

XX / Paananen Kaisa	**Master's Thesis: Developing the Onboarding Process of company X's Sales Personnel – First Round Interviews**
Haaga-Helia University of Applied Sciences Degree Program in International Business Management (IBMA/MBA)	Date: XX

Company X Business Area Y/Vice President X

Company X Business Area Z/Vice President X

1. How do you think the onboarding process of our sales personnel is currently working?

2. What in the process is working and what is not in your mind?

3. Could you elaborate what should be done to fix the problems, if there are any?

4. Do you have any development ideas regarding sales onboarding and related practicalities? How could we develop the process to increase efficiency and speed up the onboarding process?

5. How important you consider the onboarding process and its development?

6. In your opinion, do we have existing learning materials that we could use more effectively in the orientation phase? If yes, please specify. If not, what kind of materials could be beneficial for orientation purposes?

Company X

Appendix 4. Second phase data collection: Interview invitation

Hello,

I am conducting a research for my Master's Thesis related to my MBA studies at Haaga-Helia University of Applied Sciences with the following topic: 'Developing the Onboarding Process of Company X's Sales Personnel'.

I just had my 12 year anniversary with Company X, so I have been with the company for a while. My background is in the field of delivery projects. In my current role, I am working as Project Coordinator at Business Area Y’s XX unit. During the years, I have both officially and unofficially guided and coached several people, including sales personnel, in both company X specific as well as commercial and logistics related issues. I have noticed that it can be challenging for a new sales professional to familiarize him-/herself with all the details, especially in the project side. Thus, I am very interested to see how we could improve the process and I believe that my background will be beneficial in developing the process.

As we already have general company X onboarding practices and guidelines available, the purpose of this study is to concentrate on and develop the onboarding of our sales personnel. This first interview round was conducted early 2018 to find out how the topic is viewed in the business area head level.

The second/main round will be conducted in the sales manager/professional level, with the emphasis on those who have joined company X recently or changed their position inside the company.

In case this interview date/time is not suitable for you, kindly propose a new one. As I am currently on a study leave, I can be pretty flexible in terms of the interview schedule. Kindly note that I will be travelling outside Finland during 8-12 June. If you have any questions, I am happy to answer them in advance.

Please find attached the interview questions, in order for you to familiarize with the topic in advance.

Thank you in advance for your time to participate in my Master's Thesis process. Your co-operation is much appreciated. Your answers will be processed without disclosing your identity, thus feel free to state all the improvement ideas and feedback openly.

Best regards

Kaisa

Student at Haaga-Helia University of Applied Sciences
Helsinki, Finland
Degree Programme in International Business Management (IBMA/MBA)

Supervisor of my study at company X:

XX
Human Resources Manager

--
Kaisa Paananen | Project Coordinator
Company X

Appendix 5. Second phase data collection: Interview questions

XX/Kaisa Paananen

Master's Thesis Interviews

2^{nd} round

Date: xx

Please state your name and how long have you worked for company X:

Theme 1: The onboarding process at company X

The first theme of this interview covers the general onboarding process at company X, as well as the specific sales manager/professional role the interviewees possess. Thus, please evaluate the general onboarding process and sales related onboarding process separately based on the questions below.

1. How did you find the general onboarding process at company X?
2. How did you find the onboarding/orientation to your sales role?
3. What were the main challenges you had during the onboarding process?
4. How quickly you felt that you were able to start performing the actual job? What would have speeded up the process?
5. Is it clear to you how your own goals are linked to company X's organizational goals?

Theme 2: Learning material and support

In the second theme, I would like you to think about the learning material and support that we have available at company X. Kindly state how you have been using the existing learning materials and how you found them. I would also appreciate all ideas in terms of useful support and material during the orientation period. Finally, I would like to you think about how your organization/team welcomed you at company X.

6. What existing learning materials have you used?
7. How did you find the eLearning environment and the other learning materials?
8. What kind of support the sales person would need during the orientation period?
9. How did your sales team/other core stakeholder groups welcome and support you in your daily job?

Theme 3: Agile – new practices

In the end, I would ask you to consider what type of practices might be useful for company X considering the development of the onboarding process in the future.

10. Can you think of some agile practices, which would be advantage to company X in terms of onboarding and employee retention?

Company X

Appendix 6. Invitation to the thesis implementation workshop

Moi,

Pääsisittekö osallistumaan tällaiseen implementointisessioon liittyen MBA-ohjelman lopputyöhöni. Työni käsittelee myynnin onboardingin kehittämistä ja lopputuotoksena on tarkoitus saada: Implementing a Functional Onboarding Process for Company X's Sales Personnel.

XX on ollut prosessissa jo mukana varsinaisessa datankeruun haastatteluvaiheessa. Olemme hahmotelleet yhteistyössä Tiinan kanssa uuden parannellun version myynnin perehdyttämisprosessista ja haluaisimme nyt teiltä siihen kommentteja.

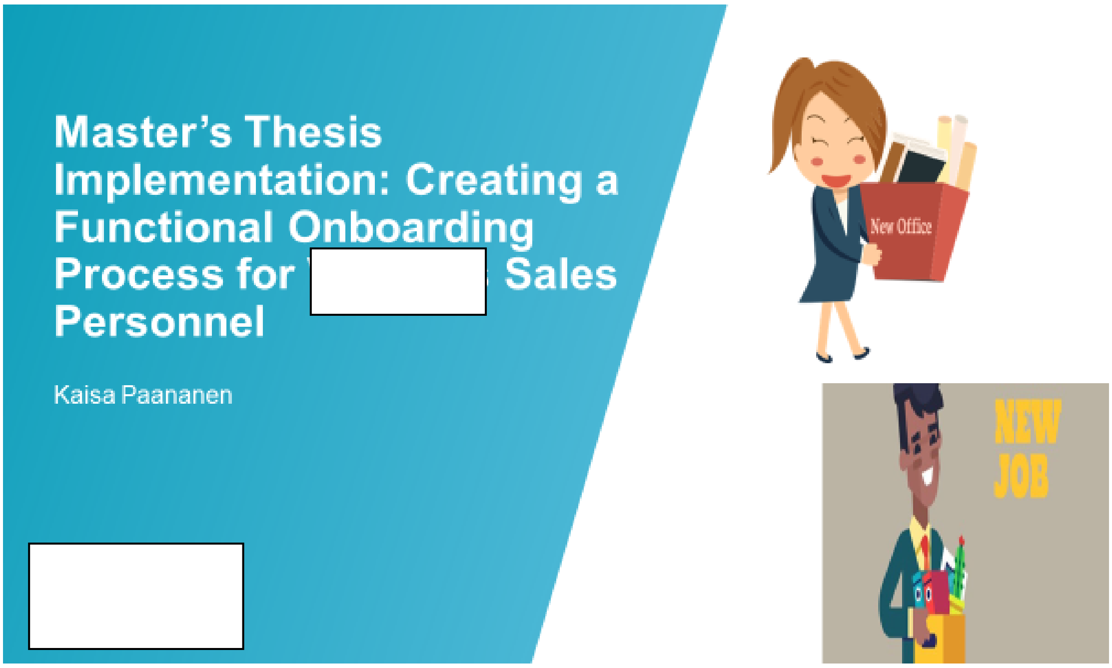
Sessioon ei tarvitse valmistautua etukäteen. Kerron ensin lyhyesti työni taustoista, aikataulusta ja prosessista, jonka jälkeen siirrymme käsittelemään itse implementointia. Esitän teille ehdotelman parannetusta prosessista ja voimme sitten muokata sitä kommenttienne perusteella. Mielestäni olisi tärkeää, että uudesta prosessista tulisi oikeasti käyttökelpoinen ja se helpottaisi sekä uuden myyjän, että esimiehen elämää. ☺

Varasin kaksi tuntia, mutta voimme luonnollisesti lopettaa aikaisemmin mikäli asia on tullut käsiteltyä.

Kiitokset etukäteen!

Kaisa

Appendix 7. Thesis implementation presentation - CONFIDENTIAL



Thesis Background and Status

- Autumn 2017: Thesis process started
- Early 2018: First round data collection: Vice President level interviews
- June 2018: Second/main data collection round: Sales Managers/Professionals
- April-July 2018: The author on study leave
- July/August 2018: Writing the thesis
- September 2018: Thesis implementation and writing
- October 2018: Finalizing the thesis
- December 2018: Graduating

Main Findings Based on the Data collection

- Everything functions on a general level
- No official onboarding package/process available -> Structured process needed
- Actual job orientation was considered inadequate
- Mentoring/coaching needed
- Starting package/tool kit for sales manager needed
- Structured product/system training needed
- way of selling: customer/market knowledge, competition, value based selling
- Onboarding process visible in eLearning
- Account Management tool needed
- Funtioning tools
- HR involvement

➢ Proposal for Revised Process

Starting Point Evaluation

- After recruitment by hiring manager & HR
- Trainings, skills needed e.g. product training, language training, practical tools training
- Face-to-face meeting – hiring manager & new employee

ONBOARDING PLAN:

- Timeline and responsibilities for the first 4 months
- Follow-up meetings frequently e.g. every 2 weeks with hiring manager & buddy/mentor colleague
- Evaluation in the end of the 4 month orientation period -> feedback on the orientation process (surveys)
- Buddy/mentor colleague for the first 4 months
  - Relevant time allocation needed
  - Clearly communicated by the hiring manager

Personal Onboarding Plan: first 4 months

by hiring manager (ownership of the process)

- [redacted] intro/orientation by hiring manager + Learning Path + participation to orientation days if possible
- ➢ New eLearning Tool – Professional & visually clear ”Learning path to [redacted] Sales”
- [redacted] sales process in practice by buddy/mentor
- Sales tools [redacted] by mentor or other relevant stakeholder
- Products and systems training via eLearning & relevant stakeholder contacts
- Language skills by external partner (company language English + others needed)
- [redacted] way of selling (business argumentation, value selling etc.) -> video of [redacted]?

[redacted]

Personal Onboarding Plan: first 4 months

by hiring manager (ownership of the process)

- Market and customers -> buddy/mentor & hiring manager
- Business finance -> Finance
- Contract content & management -> Legal
- Logistics & boarding crossing ->
- Projects ->
- Negotiation skills -> trainings for all sales professionals
- Presentation skills -> trainings for all sales professionals
- contacts -> Face-to-face meetings

Personal Onboarding Plan: 5-12 months

- Initial onboarding phase over: sales professional takes the ownership of the process
- Support by mentor/buddy: not actively involved in the process
- Follow-up meetings with hiring manager: frequency can be agreed
- One year evaluation: to cover the status of the onboarding and its outcome