

Sales Onboarding Gap Analysis

The purpose of this document is to:

- Briefly define gap analysis
- Describe the purpose of the sales onboarding gap analysis
- Briefly define what onboarding is
- Provide business priorities and supporting data
- Describe the current state and the ideal state of onboarding
- Indicate next steps



The Gap Analysis

What it is:

- A process to determine where you are and where you want to be.
- A way to quantify the difference between the current state operations and performance and the ideal state operations and performance.

What it isn't:

- A performance assessment
- A root cause analysis

Why conduct a gap analysis for sales onboarding?

- Align the goals of sales onboarding with Qlik priorities and expected outcomes
- Shift from a product-centric to a customer-centric selling approach
- Find and quantify a performance gap to address with updated onboarding experiences
- Use as a building block for a training needs and root cause analyses, followed by performance assessments

Onboarding Definition

For the purposes of Qlik sales, we are defining onboarding as the first 6 months of a sales employee's tenure at Qlik. This first 6 months includes a formal onboarding program and coaching from leadership. At 6 months, a new sales hire is expected to fulfill the role-specific sales priorities aligned with the Qlik priorities. After 6 months, training and coaching will still occur on a regular cadence, but it is considered ongoing learning and enablement.



Business Priorities: Qlik + Sales

Market Leadership

Qlik Priority:

Demonstrate leadership with our Active Intelligence platform.

Customer penetration with cross and upsell opportunities and ultimately expansion in SaaS.

Focus on SaaS first, growing SaaS ARR to over \$xxxM

Acquire xxx new enterprise customers

Expand GTM opportunities and revenue through partner ecosystem growth

Expand number of customers that contribute >\$xxK ARR by 20%

Market Leadership-aligned Sales Priorities:

- Craft solutions and connect them to customers' businesses.
- Identify target customers, recognize their business needs and articulate their decision-making process.
- Articulate unique value proposition of products versus competitive offerings.
- Strategically qualify prospects and manage the pipeline.
- Actively listen to customers on sales calls, build rapport and diagnose customer needs.
- Overcome roadblocks and handle customer objections.
- Negotiate pricing and close deals.
- Plan for growth within territory.

People

Qlik Priority:

Be the best place to work in Data & Analytics.

Protect the health and safety of our people while building a diverse, committed and engaged workforce, focused on customers.

Employee Engagement as measured through Moodtracker over 80%

Expand DE&I program with over 60% participation in ERG activities and trainings

Recruit and retain world class talent

Corporate Responsibility (CR) participation >80%

People-aligned Sales Priorities:

- Articulate and incorporate Qlik's mission, culture and values in day-to-day work.
- Articulate the purpose of an individual sales role and its connection to the broader organization.
- Become familiar with Qlik's organization processes and systems.

Financial

Qlik Priority:

Deliver outstanding operational excellence and financial performance.

ARR growth > xx% YoY
Billings growth >xx% YoY
Cash EBITDA Margin of xx%

Financial growth through best-in-class
execution measured by SaaS ARR growth
& Net Retention exceeding xxx%

Execute successful M&A to grow ARR and
addressable markets

Financial-aligned Sales Priorities:

- Find, connect with and leverage the peer support network to achieve goals.
- Leverage systems, technology, and tools for success (e.g., sales enablement tools).
- Demonstrate end-to-end sales.
- Coaching and best practice sharing from high performing reps & leaders.

Supporting Data

Market Leadership

Historical Data				Expected Outcomes		△
2020		2021		2022		
SaaS ARR Revenue	\$xM	SaaS ARR Revenue	\$xxM	SaaS ARR Revenue	>\$xxxM	>\$90M
New enterprise customers	xxx	New enterprise customers	xxx	New enterprise customers	xxx	+450
Increase co-sell	xx	Increase co-sell	xx	Increase co-sell	xx	+63
Increase Qlik Partner Program partner-touched/influence deals	xxx deals	Increase Qlik Partner Program partner-touched/influence deals	xxx deals	Increase Qlik Partner Program partner-touched/influence deals	xxx deals	+15%

Customers > \$100k ARR	xxx	Customers > \$100k ARR	xxx	Customers > \$100k ARR	xxx	20%
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People

Historical Data				Expected Outcomes		Δ
2020		2021		2022		
Attrition in Sales	xx%	Attrition in Sales	xx%	Attrition in Sales	Currently xx%, looking for below xx% (Rate is too high for 12 months)	-3%
Moodtracker Engagement	79%	Moodtracker Engagement	82%	Moodtracker Engagement	>80%	Maintain

Financial

Historical Data				Expected Outcomes		Δ
2020		2021		2022		
ARR Growth	\$xxxM	ARR Growth	\$xxxM	ARR Growth	\$xxxM	20%
Billings Growth	xx%	Billings Growth	xx%	Billings Growth	xx%	16%
SaaS ARR Growth	\$xxxM ARR	SaaS ARR Growth	\$xxxM ARR	SaaS ARR Growth	\$xxxM ARR	3-4x
Total Revenue - Churn	\$xxxM	Total Revenue - Churn	\$xxxM	Total Revenue - Churn	\$xxxM	\$64M

Summary of Survey Data

[redacted]

Current State & Ideal State

Market Leadership

Priority: Demonstrate leadership with our Active Intelligence platform. Customer penetration with cross and upsell opportunities and ultimately expansion in SaaS.

Current State	Ideal State	Gap	Aligned Sales Outcome
Recently onboarded reps without business intelligence or data integration backgrounds cannot articulate Qlik's value proposition to prospects and customers.	An onboarded rep can have an intelligent conversation with a prospect or customer at various levels of the organization, from C-level to line of business.	Ability to position Qlik by articulating our value proposition and positioning against competitors. Practice and role play opportunities.	Articulate unique value proposition of products versus competitive offerings.

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding focuses on product knowledge and product deep-dives, requiring new hires to produce a Qlik Sense app demo on the associative difference, and answer questions about product features and functions.</p>	<p>An onboarded rep can intelligently describe the data pipeline, what Qlik does with the data pipeline, and why we do it.</p>	<p>Ability to describe and discuss what Qlik does with its various products and solutions across the data pipeline, and why. Practice and role play opportunities.</p>	<p>Craft solutions and connect them to customers' businesses.</p> <p>Articulate unique value proposition of products versus competitive offerings.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding lacks discussion of our prospects and customers and the industries and personas we sell to.</p>	<p>An onboarded rep can describe the types of industries and personas we sell most successfully to, and has an understanding of the industries and personas where they can grow our market.</p>	<p>Development of buyer acumen and growth potential, and development of persona-based messaging.</p>	<p>Craft solutions and connect them to customers' businesses.</p> <p>Identify target customers, recognize their business needs and articulate their decision-making process.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
Onboarding does not train on topics around qualifying opportunities,	An onboarding program examines how and why we qualify opportunities, and the criteria that comprise a good opportunity.	Understanding of Qlik-specific opportunity qualification, ability to recognize when to position (and to whom) and when to walk away.	<p>Strategically qualify prospects and manage the pipeline.</p> <p>Actively listen to customers on sales calls, build rapport and diagnose customer needs.</p>
Onboarding is product-centric and uses a sales methodology developed in 2015.	Onboarding will teach reps to sell using a customer-centric methodology.	Vetted sales methodology, training around customer-centric selling.	Craft solutions and connect them to customers' businesses.

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding lacks training around territory planning.</p>	<p>Onboarding will teach planning for growth within a territory, including cross- and up-sell, market trends, applying market trends and insights, and prospecting methods for a territory.</p>	<ul style="list-style-type: none"> • Territory analysis and planning skills • Sales methodology with cross- and up-sell techniques • Prospecting and opportunity qualification 	<p>Plan for growth within territory.</p> <p>Articulate unique value proposition of products versus competitive offerings.</p> <p>Strategically qualify prospects and manage the pipeline.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding lacks training around sales calls.</p>	<p>Onboarding will provide strategies and practice opportunities for sales calls.</p>	<ul style="list-style-type: none">• Sales call and prospecting strategy workshops• Practice sales calls and role plays	<p>Actively listen to customers on sales calls, build rapport and diagnose customer needs.</p> <p>Overcome roadblocks and handle customer objections.</p> <p>Negotiate pricing and close deals.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboard lacks action plans and scenarios modeled on issues reps will encounter on the job.</p>	<p>Onboarding will use a common story throughout all its phases will include developing an action plan around an actual customer or prospect.</p>	<ul style="list-style-type: none"> • Development of story or use case to use throughout design of onboarding • Sales leadership involvement in action planning 	<p>Craft solutions and connect them to customers' businesses.</p> <p>Identify target customers, recognize their business needs and articulate their decision-making process.</p> <p>Articulate unique value proposition of products versus competitive offerings.</p>

People

Priority: Be the best place to work in Data & Analytics. Protect the health and safety of our people while building a diverse, committed and engaged workforce, focused on customers.

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Current ramp-up time for a new sales hire is 8-12 months.</p>	<p>Enterprise sellers will be onboarded within 6 months.</p>	<p>Focus on Qlik and Sales priorities in a specific and well planned cadence.</p>	<p>Articulate the purpose of an individual sales role and its connection to the broader organization.</p>
<p>Onboarding uses a “rolling admissions” format with new hires beginning as soon as they have access to appropriate systems.</p>	<p>Onboarding will use a cohort format that allows for social learning and interaction with peers.</p>	<p>Processes for grouping and starting new hires in cohorts.</p>	<p>Articulate the purpose of an individual sales role and its connection to the broader organization.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
Sales reps are expected to do activities outside of onboarding that create conflict with sales leadership and sales enablement.	New hires will be protected and buffered from responsibilities outside of onboarding.	<ul style="list-style-type: none">• Sales leadership and executive buy-in.• Process to transition from onboarding to role.	Become familiar with Qlik's organization processes and systems.

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding program uses a one-size-fits-all approach, and all new hires from BDRs to PAMs are required to do the same activities.</p>	<p>Design of onboarding will be segmented by role, with core competencies required of all new hires, and specific competencies delineated by role.</p>	<ul style="list-style-type: none"> • Role-based competency analysis and definitions • Process for managing cohorts across different roles 	<p>Articulate and incorporate Qlik's mission, culture and values in day-to-day work.</p> <p>Articulate the purpose of an individual sales role and its connection to the broader organization.</p> <p>Become familiar with Qlik's organization processes and systems.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding does not review who Qlik is as a company, what the sales roles are, or what the expectations are of sales roles.</p>	<p>Onboarding will introduce new sales hires to Qlik, define the roles within sales, and the expectations and competencies for each role.</p>	<ul style="list-style-type: none"> • Updated sales progression tables • Updated overarching Qlik onboarding/introductions • Sales leadership involvement in setting expectations 	<p>Articulate the purpose of an individual sales role and its connection to the broader organization.</p>
<p>Onboarding briefly touches on the greater Qlik ecosystem sales reps work within, including partners and Customer Success.</p>	<p>Onboarding will train new sales hires on the people and organizations that support the sales cycle, who to leverage for support, and when.</p>	<ul style="list-style-type: none"> • Defined processes and handoffs for different organizations • Involvement of other teams in development of materials 	<p>Become familiar with Qlik's organization processes and systems.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding success is measured by “seat-time”/completion of knowledge assets, and several knowledge checks.</p>	<p>Onboarding success will be measured by a new hire’s ability to apply the skills required in their role and implement an action plan they developed as part of the onboarding experience.</p>	<ul style="list-style-type: none"> • Updated sales progression tables • Role-based competency analysis and definitions • Level 3 testing and evaluation 	<p>Articulate and incorporate Qlik’s mission, culture and values in day-to-day work.</p> <p>Articulate the purpose of an individual sales role and its connection to the broader organization.</p>
<p>Onboarding is comprised mainly of video-based information and knowledge transfer. Most videos are 30-60 minutes in duration.</p>	<p>Learning experiences will be consumable and digestible and will include skills-application experiences.</p>	<ul style="list-style-type: none"> • Development of activities • Coaching throughout the entire onboarding process 	<p>Become familiar with Qlik’s organization processes and systems.</p>

Current State	Ideal State	Gap	Aligned Sales Outcome
<p>Onboarding lacks examples of customer wins and aspirational success stories.</p>	<p>Onboarding will leverage customer success stories and collateral as part of new hires developing their own enduring materials and workbooks to support them in their roles.</p>	<p>Self-directed planning, creation and implementation of support and job aids.</p>	<p>Become familiar with Qlik's organization processes and systems.</p>
<p>Onboarding depends on ad hoc, informal feedback from new hires and business areas to keep content up to date and relevant.</p>	<p>Onboarding will include a formal channel for feedback and will solicit the input of all stakeholders.</p>	<ul style="list-style-type: none"> • Continuous feedback channel on MindTickle • Input from CSO, sales leadership, reps, and partner org 	<p>Articulate and incorporate Qlik's mission, culture and values in day-to-day work.</p>

Financial

Priority: Deliver outstanding operational excellence and financial performance.

Current State	Ideal State	Gap	Aligned Sales Outcome
Onboarding has minimal discussion of customer lifecycle.	Onboarding will describe the customer lifecycle, and the role that different systems and organizations have in that lifecycle.	<ul style="list-style-type: none">• Defined processes and handoffs for different organizations• Involvement of other teams in development of materials	Find, connect with and leverage the peer support network to achieve goals. Leverage systems, technology, and tools for success (e.g., sales enablement tools).

Current State	Ideal State	Gap	Aligned Sales Outcome
Onboarding does not address systems and tools training.	Onboarding will train new hires to leverage our systems, technologies and tools, and use them throughout the lifecycle.	<ul style="list-style-type: none"> • Training on customer lifecycle • Identification of tasks and tools required throughout lifecycle • Systems and tools training 	<p>Leverage systems, technology, and tools for success (e.g., sales enablement tools).</p> <p>Demonstrate end-to-end sales.</p>
Onboarding does not specifically address management of customer accounts and sales lifecycle.	Onboarding will contain training and practice on best practices in customer account management, forecasting, and pipeline management, and how to nurture accounts throughout the sales lifecycle.	<ul style="list-style-type: none"> • Sales methodology • Forecasting and pipeline training 	<p>Leverage systems, technology, and tools for success (e.g., sales enablement tools).</p> <p>Demonstrate end-to-end sales.</p>

Next Steps

- Gather data, information, and materials to address gaps
- Solicit input and buy-in from all stakeholders:
 - Sales leadership
 - Customer Success
 - Global Solutions and Partners
 - Sales Operations
 - Field sales, BDRs, and PAMs
- Design measurable learning objectives around ideal state for sales onboarding
- Design and develop learning assets and experiences based on learning objectives
- Design and develop evaluation methods for assessing onboarding success



About Qlik

Qlik's vision is a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. Qlik provides an end-to-end, real-time data integration and analytics cloud platform to close the gaps between data, insights and action. By transforming data into active intelligence, businesses can drive better decisions, improve revenue and profitability, and optimize customer relationships. Qlik does business in more than 100 countries and serves over 50,000 customers around the world.

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