**SMARTtools for Leaders™**

**Onboarding Discussion (preparation notes)**

**Name:** Karen Tan **Role:** VP of Sales

**Date:** 12/1/2016 **Hiring Manager:** Morgan Jones

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| **PRIORITIES** | |
| ***Let’s review your scorecard, and discuss what you are likely to find easy or hard about this job.*** | * Your mission impossible, Karen, is to grow our software revenue from $12.5m in 2016 to $100m by end of 2020. That’s 8x in 5 years, or 52% per year compound annual growth rate (CAGR). That’s hard! But given your track record, it’s do-able. * To make things even harder, we have a very high customer satisfaction rate, 90%, which we would like to maintain during the growth. We know you care deeply about customers’ getting real value vs. fake value, so we think you’ll excel in this area. * We want to increase the gross margin from software from 18% to 25%, mostly by picking better target customers. Now, I understand you like to price low to win business. We’re going to have a problem with that approach because we can’t really afford to support so many new customers at lower-than-target pricing. OK? Let’s talk about this one. * The inside sales team only has 5 people in it today. We have budget for you to grow that to 10 account managers in your first year. I’m hopeful you can bring some of your best performers from your network, but obviously nobody who has a non-compete. * Finally, we have this huge 2017 strategic plan initiative. You are joining the leadership team late in this process, but we want your 2 cents by end of January before we pour the concrete on the 2017 strategy. You seem to like simple, focused strategies vs. long, drawn-out processes, so I think this timing works for you, yes? * Questions? |

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| **WHO** | |
| ***Let’s talk about who are the most relevant people to your success here.*** | * I’m Morgan Jones, the CEO, as you know, your boss. But I want to work like partners, not boss-subordinate. * You’ll want to get with Tina Salazar, the CTO. She’s very into her Agile/Scrum processes for modifying product features, so you are going to want to sync with her process vs. just telling her developers to make changes OK? (Mention references and her interviewers expressed a concern about going direct to developers to make changes). * Our CFO, Bart Sampson, is a big teddy bear of a guy. He’s very nice. He doesn’t bite. You should stay close with him on the whole margin/pricing issue. He’s very responsive, so he won’t hold you up if you want to ink a deal with a customer. * I think Ron the VPHR will be helpful in running the hiring processes for your new account execs. He’s really good. And his recruiting team is really good. So you can lean on them to get the candidate pipeline going; of course source in the best candidates you can, and they will help source some too. * Those are the 4 most important colleagues for your success. * On the customer side, here is a list of the 10 customers who are “Friends of the firm” who mean a lot and who send us referrals quite often. I’d recommend getting with these 10 key customers asap to introduce yourself and start to build a relationship. |

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| **RELATIONSHIPS** | |
| ***Let’s decide how you and I will communicate, and when, to achieve results.*** | * I would like to hear your prefs. I understand you are pretty self-managing. ☺ So I don’t want to get in your way. How about we schedule a standing 1-on-1 problem-solving session every Friday at 8am for 30 minutes. I’d like to do a 90-minute deep dive on your revenue pipeline and talent of your team once a quarter. I hate texts, but I love emails or call my mobile any time. * Tell me--How you would like to communicate, so we can stay focused on results and hit our revenue number? |

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