



## How Paychex Uses Video to Accelerate Onboarding and Drive Employee Engagement

*Learn how Paychex used Rehearsal to shorten speed to competency by 41% and increase revenue by 10%*

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### Strategic Goal

In order to decrease new Small Business Market (SMB) sales rep turnover and better optimize revenue opportunities, Paychex needed to dramatically re-engineer its sales onboarding. In collaboration with Senior Leadership, the L&D team quickly began gathering data: exit interviews, sales KPIs, a very informative secret shopper report, manager/sales rep interviews, and social media data from clients and prospects - to better understand the problem and help leadership set targets.

## Program Details

Research findings were used to overhaul the new hire training program and create 'Selling Simplified', a 10-week onboarding program reflecting the current business landscape, workforce, competition, customer prospects, and what persuades them to buy now.

'Selling Simplified' concentrates on engaging the new employee by building confidence and accountability. The blended learning approach includes: 35 self-paced eLearning modules, a dedicated learning coach who facilitates ongoing virtual coaching sessions, social

learning, video role-play assignments and certifications, and a Sales Skills Master Program (a compact 2.5 days of experiential learning), including objection handling and discovery (intentional questioning & quantifying questions). The modules and content help give new sales representatives the knowledge they need to have that first conversation with a prospect and make an appointment.

Several techniques have proven important. Learning coaches work closely with each new hire, which helps build confidence. Paychex uses single objective learnings to drive knowledge and skills retention. Single objective learnings require that employees master one skill before moving on to the next through a certification process that involves Rehearsal video-based practice assignments between instructor and learner. This process lets the employee demonstrate each sales skill with their coach, apply their learning immediately on-the-job, and continuously add new skills to their portfolio.

Rehearsal is instrumental in the 'Selling Simplified' program. It gives sellers the opportunity to truly practice with the vast product/service offering, receive personalized coaching and feedback, and perfect their skills, increasing both confidence and competence. Rehearsal also drives accountability for both

## Goals



### Retention

Maintain 75% retention of new sales reps in their first year.



### Revenue

Increase Revenue per Unit (average revenue per sale).



### Efficiency

Reduce time to competency from 17 weeks to 10.

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learners and instructors, while providing senior leadership visibility to the status and impact of video-based practice and coaching. Due to the high-profile nature of this program, Paychex had to fully re-engineer onboarding with innovative techniques including:

- Replacing unwieldy 80-person classroom sessions with virtual, small cohort-based learning communities allowing for interaction during formal coursework and informally between virtual instructor-led sessions
- Supplementing the sales manager's role with a learning coach who facilitates formal coursework, serves as an on-call coach and mentor for learners by providing feedback, expert guidance and reinforcement for new sales reps in the field
- Consistently using coaching calls three times per week during the first six weeks, then once per week through the tenth week, to discuss data and reinforce knowledge delivered by the sales tracking tool
- Adding certification via Rehearsal's video-based practice tool which allows the learner to practice, perfect, and then submit presentations to the instructor for feedback
- Using single objective learnings which focus on critical topics such as setting appointments and discovery and gating topics until a new employee has been certified
- Designing a manager facilitator guide to provide guidance on weekly activities and expected skills attainment inclusive of checklists for 1:1 meetings and suggested activities for reinforcement
- Requiring manager-level certification to ensure compliance with the role of the manager and a comprehensive understanding of the facilitator guide

## **Program Reinforcement**

### SHORT TERM

- Learning instructors reinforce learnings three times per week over a 10-week period through coaching calls, conversation starters within LMS communities two times per week, and certifications via Rehearsal weekly
- Learning communities allow for peer-to-peer reinforcement when instructors post questions or topics on the community board and ask the cohort to contribute to the conversation

### LONG TERM

- Rehearsal is used for ongoing practice, coaching and feedback, perfecting word-tracks and validating knowledge and skill set well beyond training

## Results Achieved

Paychex achieved real results with the new program, yielding an increase in retention of 8% after a full year, exceeding their original goal of 75%. Their results didn't stop there, they also experienced a 10% increase in business revenue during the training period when compared to the same timeframe for the previous instructor-led program. This increase in revenue was the direct result of not only confidence, but competence, as they were able to accelerate speed to competency for new hires by 41%, meaning they performed at a high level faster than that of prior training programs.

### ADDED BENEFITS

- Engagement and activity were higher
- Enabled virtual touchpoints as learners wanted more social and collaborative work
- Employee surveys indicate **79% of survey participants rated the Virtual Coaching experience as 'Very Good' to 'Excellent'** and a **majority of respondents said Rehearsal was one of the most beneficial training methods**

8%

increase in retention

10%

increase in business revenue

41%

increase in speed to competency

68%

reduction in travel expenses

Old Program - 17 Weeks	Revamped Program - 10 Weeks
<ul style="list-style-type: none"> <li>• Tier 1: two-week curriculum facilitated by DSMs in the field</li> <li>• Tier 2: two-week instructor led training</li> <li>• Tier 3: twelve-week combination of self-study materials and partnership activities with managers and peers</li> <li>• Tier 4: one-week instructor led training</li> </ul>	<ul style="list-style-type: none"> <li>• Weeks 1 – 8                             <ul style="list-style-type: none"> <li>• 3 weekly coaching calls</li> <li>• Combination self study, social learning, and video coaching</li> </ul> </li> <li>• Week 9: 2½ day master class</li> <li>• Week 10: End Unit                             <ul style="list-style-type: none"> <li>• Presentation Certification with DSM and Learning Coach</li> </ul> </li> </ul>

## What's Next?

Although the 'Selling Simplified' training program was designed for the Small Business Market (SMB) segment of the Paychex sales force, they look to expand the use of Rehearsal for several new use cases. Scaling video-based practice using Rehearsal's Intelligent Journeys functionality will help overcome the workload challenge experienced by coaches and mentors. For example, all 1,700 sales reps go through a scenario, conduct a self-assessment, promote the best performances to the Leaderboard, or provide individualized coaching as needed.

## Elevate Your Organization

If increased speed to competency, retention, and revenue are important to your organization, contact us today to learn how Rehearsal video-based practice can be incorporated into your training and skills development programs.

Remember, whether athlete, sales rep, or CEO, no one becomes great without practice!

