STRUCTURE THE ONBOARDING

The playbook your junior BMs never received

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A junior BM should not learn solely by observing seniors. A written playbook formalizes best practices, speeds up the skill development process, and transforms experience into a transferrable method.

A junior Business Manager arrives with a job description and CRM access. The rest, they figure out by observing the seniors. Writing down what is expected of them would change a lot, provided it doesn't become a script.

Ask an IT company executive. What does a junior Business Manager receive on their first day? The answer consists of just a few words. A computer, CRM access, a job description, sometimes a list of accounts to take over. And a senior to sit next to.

The senior does their best. They make calls, assess a need, present a consultant, calm an unhappy client. The junior watches. They retain the actions, rarely the reasons. Why did the senior call back that manager on Thursday instead of Monday? Why did they refuse to send that resume? They don't say, due to lack of time, and often because they no longer know themselves. Their reflexes have become invisible, even to them.

Talent does not replace a method

Juniors are hired for their energy and eagerness, and then expected to let this talent do the work. I believe this is a flaw in reasoning. Talent has its good and bad days. A written method is always there

on Monday morning, when the junior has faced three consecutive rejections and doesn't know where to start over.

I am convinced that an inexperienced junior can become effective in a few months if they receive a written framework from the start, study it, and apply it immediately. Without this framework, they apply methods that work only half the time. They get discouraged and leave. Or they stay and stagnate, which in my opinion costs more than a departure, because no one notices them.

What a Business Manager playbook contains

Nothing spectacular. The situations every Business Manager encounters in their first weeks, and the way your company has chosen to respond to them.

- the opening of a prospecting call, and what is aimed to be achieved in the first minute
- conducting a discovery, the key questions, and what to do with the answers
- introducing a consultant to a client
- the objections your Business Managers hear every week, with your responses
- the rules for sending a resume (when, to whom, with which candidate's consent)

Each sheet fits on one page. It says what to do and especially why it's done. The "why" allows the junior to adapt when the situation falls outside the framework, which happens almost all the time.

A playbook is discussed, a script is recited

The objection arises every time. "Our Business Managers are not telemarketers." I agree. No one asks the junior to recite anything.

On the first day, they read the playbook. During the first week, they apply it. Then, each debrief with their senior starts from a specific page. How did you handle this call? What worked? What do we change?

The document evolves. When a senior finds a better response to an objection, it is added. The team's knowledge stops leaving with those who depart.

Who writes it?

The seniors, with a bit of help. Those who are the best at doing it often struggle the most to explain. Someone needs to ask the questions, to uncover the reasons behind the reflexes, and to organize it all.

The exercise also benefits the senior themselves. Articulating what they do instinctively is the first step in learning how to coach. We best pass on what we have put into words.

This is the type of journey I build with my clients at CoAct, based on what their best Business Managers already do. If you want to know where your own integration system stands, the Maturity Diagnosis is a good starting point.

And at your company, what have you written for your juniors?