

# Sales Onboarding Checklist

Comprehensive ramp plan from pre-onboarding through first month

Sales Hire Name:

| Pre-Onboarding      |                          |   |        |      |                            |
|---------------------|--------------------------|---|--------|------|----------------------------|
| Category            | Topic                    | Description   | Status | Time | Owner                      |
| Welcome             | Send welcome email       | Include start details, point of contact, documents for Day 1, and Day 1 schedule. |        |      | HR                         |
| Day 1               |                          |   |        |      |                            |
| Category            | Topic                    | Description   | Status | Time | Owner                      |
| Getting Started     | HR Orientation           | Company policy, goals, employment rules, perks, org chart.                        |        |      | Instructor Led: HR Team    |
| Getting Started     | Sales Onboarding         | Introduction to the onboarding process, what to expect, onboarding plan.          |        |      | Instructor Led: HR Team    |
| Collaborating Teams | Introduction meeting     | Meeting with sales manager.   |        |      | HR                         |
| Collaborating Teams | Introduction meeting     | Meet the buddy or mentor and get to know the culture, team, and organization.     |        |      | Buddy                      |
| Collaborating Teams | Introduction meeting     | Catch-up sessions with peers.   |        |      | HR                         |
| Task                | Pre-Onboarding documents | Share the pre-onboarding documents with the new hire to read and follow.          |        |      | Guided & Self-Paced        |
| First Week          |                          |   |        |      |                            |
| Category            | Topic                    | Description   | Status | Time | Owner                      |
| Getting Started     | HR documenting           | Manage new hire profiles and announce arrival company-wide.                       |        |      | HR                         |
| Sales Tools         | Sales tools introduction | Introduction to all sales tools, overview, and access.                            |        |      | Instructor Led: Sales Team |

| Category           | Topic                             | Description  | Status | Time | Owner                                 |
|--------------------|-----------------------------------|--|--------|------|---------------------------------------|
| Industry Knowledge | Reading of blogs and case studies | Read through blogs and case studies to understand industry trends.                           |        |      | Guided & Self-Paced                   |
| Sales Process      | Summary of sales processes        | Sales process introduction, sales stages, qualification, lead value chain, daily operations. |        |      | Guided & Self-Paced or Instructor Led |
| Introduction       | Company organizational structure  | Different teams, org structure, and KPIs.  |        |      | Instructor Led: HR                    |
| Sales Tools        | CRM training session 1            | First customer relationship management training session.                                     |        |      | Instructor Led: Sales Team            |
| Assessment         | CRM assessment                    | A short assessment to help retention of information.   |        |      | Guided & Self-Paced                   |
| Week 1 Refresher   | First week review                 | Quick refresher and discussion on Week 1.  |        |      | Instructor Led: HR                    |

## First Month

| Category               | Topic                              | Description  | Status | Time | Owner               |
|------------------------|------------------------------------|--|--------|------|---------------------|
| Sales Tools            | Chorus software training           | How to set it up and use it.   |        |      | Instructor Led      |
| Product Training       | Product details familiarization    | Understand how the product works.  |        |      | Guided & Self-Paced |
| Sales Process Training | Prospecting and objection handling | Train reps on prospecting, negotiating, and handling objections following company protocols. |        |      | Instructor Led      |
| Sales Tools            | CRM training session 2             | Second customer relationship management training session.                                    |        |      | Instructor Led      |
| Buyer Persona          | Customer personas                  | Understand key responsibilities, top metrics, challenges, and value statement for buyers.    |        |      | Instructor Led      |
| Task                   | Competitor study                   | Build a competitive research sheet.  |        |      | Guided & Self-Paced |
| Product Knowledge      | Case studies                       | Read and get familiarized with different case studies.                                       |        |      | Guided & Self-Paced |
| Assessment             | Case study assessment              | A short assessment to help retention of information.   |        |      | Guided & Self-Paced |

| Category             | Topic                        | Description  | Status | Time | Owner               |
|----------------------|------------------------------|--|--------|------|---------------------|
| Sales Training       | Recorded cold calls review   | Listen to discovery calls to understand the questions to ask.  |        |      | Guided & Self-Paced |
| Sales Training       | Mock cold call               | Mock call based on a scenario.   |        |      | Instructor Led      |
| Sales Training       | Demonstration video viewing  | See what the customer sees and hears.  |        |      | Guided & Self-Paced |
| Sales Tools          | Outreach techniques          | Dive deeper into outreach.   |        |      | Instructor Led      |
| Sales Training       | Cold call practice           | New hire to practice and perfect their elevator pitch and send it to the sales enablement team.                  |        |      | Guided & Self-Paced |
| Sales Training       | Live cold call practice      | New sales reps make sales calls on their own to prospects they have been reaching out to.                        |        |      | Instructor Led      |
| Feedback             | Three and six month feedback | Plan and schedule three month and six month surveys for the employee. Optimize onboarding based on feedback.     |        |      | HR                  |
| Employee Development | One-on-one                   | Check that reps are identifying relevant opportunities to support continued sales effort and career development. |        |      | HR                  |

## Additional Sales Training Resources

- What is product knowledge training?
- What is a digital adoption platform?
- Lessons from failed CRM implementations
- CRM training resources
- CRM end-user training guide
- CRM onboarding best practices