Sales Onboarding Checklist

1. General Employee Orientation

- Send a company-wide new employee announcement email
- Review and explain the company's mission and vision statements
- Discuss company values, history, leadership, and organizational structure
- Tour the facility and make introductions
- Finalize any remaining hiring paperwork
- Provide and review the employee handbook
- Confirm the sales compensation structure Outline the employee benefits program
- Go over paid time off (PTO), how to request time off, and paid company holidays
- Review health and safety policies
- Provide any items needed for facility access

2. Workstation & Technology

- *Set up workstation hardware and equipment, such as:
  - Desktop computer, monitor, and mouse
  - Telephone
  - Printer
  - Additional monitor
- Provide and set up mobile devices like a laptop, smartphone, or tablet and associated apps and accounts
- Create an email account
- Assign a phone extension or number
- Review how to access voicemail, record greetings, and settings
- Install needed software and create a user account for collaboration software, such as:
  - Customer relationship management (CRM) software
  - Project management (often included in CRM software)
  - Team messaging software and apps
  - File-sharing applications
  - Productivity apps
  - Video conferencing applications
- Provide an overview of how to use the equipment
- Discuss company policies and expectations for the use of company technology, equipment, and supplies

3. Operational Sales Onboarding Training

- Send a new employee announcement and welcome email to the department
- Tour the department and make introductions
- Show the new hire important spaces such as the break room, restrooms, cafeteria, or kitchen, and where to get office supplies
- Review the sales department's organizational chart
- Review the sales culture of your organization
- Go over what the typical day-to-day sales operation
- Discuss any operational adjustments required due to seasonal changes, for example, you may have a "busy season" where most of your revenue is generated, requiring sales employees to work longer hours during that time period and shorter working hours during other time periods

4. Product & Service Training

- Discuss the technical aspects of the product or service in terms of features, benefits, what it does, how it works, and the main selling points
- Review the ideal customer types and buyer personas for the product or service
- Product demonstrations and presentations covering use and features
- Provide access to online products, such as SaaS (software as a service) products to become familiar with use, features, and benefits
- Review product documentation, technical manuals, user guides, and sales brochures to help the new hire thoroughly understand the products and services they will be selling

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5. Sales Process Training

- Review the sales process, including how to:
  - Generate new leads (tactics used)
  - Input new leads into the CRM
  - Update sales pipeline information
  - Nurture leads
  - Qualify and score leads
  - Close sales
  - Onboard new customers and pass them to account management
- Go over resources and procedures for cold calling, including:
  - Cold calling scripts
  - Following up with cold leads
  - Lead qualification
  - Handling objections
  - Provide training and access for how to use your CRM
  - Discuss and provide simulation practices for conducting a sales presentation

6. Goals & Expectations Setting

- Outline the performance expectations in terms of metrics and activity, including:
  - Number of calls placed
  - Number of appointments scheduled
  - Number of demos booked
  - Number of free trials started
  - Number of proposals sent
  - Total deals closed and/or total sales revenue
- Go over personal and team sales goals as well as the rewards for hitting them
- Discuss procedures or consequences of not hitting sales performance expectations
- Cover resources available (mentoring, training, coaching) to hit their sales goals

7. Lead Generation Resource Allocation Training

- Provide a lead list to the new sales rep with contact information and any notes
- Offer detailed customer profiles on different leads
- Explain how inbound leads are allocated among members of the sales team
- Assign the new salesperson to a Chamber of Commerce, trade or business association, or lead share group to create business and referral opportunities

8. Periodic Check-Ins with New Hires

- Check to see if the new salesperson is hitting their required metrics
- Ask if the sales rep has ideas for improvements
- Determine if the new salesperson is having any specific difficulties with their role
- Ask if there are any tools or training to help them improve their performance
- Ensure all of their equipment and technology is working properly
- Ask if there is any training or topics covered during onboarding or orientation they would like a refresher on