Sample sales onboarding checklist

Onboarding is designed to help a new rep ramp and close deals faster, and it all revolves around a 30/60/90-day plan. A 30/60/90-day plan most importantly starts with a checklist for the manager to use to onboard their team members from day 1 to day 90. Use this template to get you started.

| **0-30 days** | | | |
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Building company, product, buyer, and sales knowledge

**Week 1:**

* Baseline sales confidence self-assessment
* Company onboarding session
* Product overview webinar
* Role-based sales process overview webinar
* Sales tech stack how-to guide
* Meet with a sales mentor

**Week 2:**

* Product overview webinar
* Pitch workshop
* Product demo workshop
* Product knowledge assessment
* Selling scenarios role-play
* Meet with sales mentor

**Week 3:**

* Account planning workshop
* Prospecting and list-building workshop
* Sales process certification
* Meet with a sales mentor

**Week 4:**

* Skip-level sales leader mentor session
* 30-day sales confidence self-assessment

| **30-60 days** | | | |
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Applying company, product, buyer, and sales knowledge

**Week 5:**

* Email prospecting to a defined list daily
* Shadow prospecting calls
* Shadow discovery calls

**Week 6:**

* Email prospecting to a defined list daily
* Shadow pitching calls
* Shadow implementation calls

**Week 7:**

* Email prospecting to a defined list daily
* Recently closed and won deal reviews with account teams

**Week 8:**

* Prospect to a defined list daily
* 60-day sales confidence self-assessment

| **60-90 days** | | | |
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Performing according to company, product, buyer, and sales knowledge

**Week 9:**

* Sales rep phone prospecting and outreach
* Conduct discovery calls
* Review calls with sales leadership
* Discovery certification

**Week 10:**

* Conduct demo calls
* Review calls with sales leadership
* Demo certification

**Week 11:**

* Conduct pitching calls
* Review calls with sales leadership
* Pitching certification

**Week 12:**

* 90-day sales confidence self-assessment