

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

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

Week 4:

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

30-60 days

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

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