Chapter 1: Pre-Onboarding

1.1 Offer & Documentation

- Issue offer letter and employment contract
- Collect necessary documents (ID, tax info, bank details, non-disclosure agreements)

1.2 IT & Systems Setup

- Create corporate email and Slack/Teams accounts
- Provision laptop, phone (if needed), and software tools (CRM, sales enablement, etc.)
- Grant access to HRIS, LMS (Learning Management System), and CRM (e.g., Salesforce)

1.3 Welcome & First Day Communication

- Send welcome email with Day 1 agenda
- Share company handbook, benefits summary, and tech sales team intro pack
- Assign onboarding buddy

Chapter 2: Company & Culture Orientation (Day 1-2)

2.1 Company Overview

- CEO welcome message or town hall recording
- History, mission, values, vision, and leadership structure

2.2 Corporate Policies & Compliance

- Workplace conduct and ethics
- Information security and data privacy (especially for sales roles with client data)
- Anti-harassment and DEI training

2.3 HR Essentials

- Overview of payroll, benefits, leave policy, and performance review cycle
- Introduce employee support channels (HR contact, wellness programs, etc.)

Chapter 3: Sales Department Integration (Week 1)

3.1 Team Introductions

- Meet Sales Director, Sales Ops, Marketing, and RevOps teams
- Overview of cross-functional collaboration (product, legal, customer success)

3.2 Role Clarity

- Define SDR vs. AE vs. Sales Manager responsibilities
- Introduction to sales targets, KPIs, and commission structures

3.3 Tools & Systems Training

- CRM (Salesforce, HubSpot)
- Sales enablement tools (Outreach, Salesloft, Gong)
- Communication tools (LinkedIn Sales Navigator, ZoomInfo)

Chapter 4: Product & Market Training (Week 2–3)

4.1 Product Deep Dive

- Features, benefits, and competitive differentiators
- Common customer pain points and how the product addresses them
- Roadmap overview with product managers

4.2 Market & ICP

- Ideal Customer Profile (ICP) and buyer personas
- Market trends and industry insights
- Competitor landscape and battle cards

4.3 Use Cases & Case Studies

- Walkthrough of real customer case studies
- Vertical-specific sales strategies (e.g., fintech vs. healthcare vs. SaaS)

Chapter 5: Sales Process & Methodology (Week 3–4)

5.1 Sales Funnel Stages

- Lead qualification, discovery, demos, proposal, closing
- Tools used at each stage (CRM tracking, forecasting tools)

5.2 Sales Methodology

- Training on corporate-standard methodology (e.g., MEDDIC, SPIN, Challenger)
- Role-playing scenarios with peers or managers

5.3 Shadowing & Live Calls

- Shadow top performers on discovery calls and demos
- Debrief and feedback after each session

Chapter 6: Certification & Ramp-Up (Week 4–8)

6.1 Knowledge Assessments

- Internal quizzes on product knowledge, sales playbook, and CRM use
- Mock pitch presentations to manager or sales enablement team

6.2 Certification

- “Sales Ready” certification issued after meeting training standards
- Internal leaderboard or badge in LMS

6.3 Soft Launch

- Begin handling small deals or inbound leads under supervision
- Weekly check-ins with sales manager to review pipeline

Chapter 7: Performance Milestones & Growth (Ongoing)

7.1 30/60/90 Day Reviews

- 30-Day: Focus on ramp-up metrics, comfort with tools/process
- 60-Day: Evaluate prospecting effectiveness, product fluency
- 90-Day: Full ownership of quota and deals

7.2 Continuous Enablement

- Monthly workshops (e.g., negotiation, objection handling)
- Access to external courses or certifications (e.g., Salesforce Trailhead, Winning by Design)

7.3 Career Development

- Define career paths (e.g., SDR to AE, AE to Sales Manager)

- Annual development plan with manager and HRBP