



Onboarding Process

Even if you hire a quality candidate, ramp up can be much quicker and effective by ensuring they know your strategy, market, competitors and what's expected from them.

SALESPERSON:

CLIENT:

DATE:

*Structure your on-boarding over 90 days and follow our top key points.
Add other ones that are important to your company.*

Contacts & Support

1. Who can I go to for help? Positions, contacts, a buddy? 5 most important

Position	Contact	Phone / email	Help they provide

Ideal Customer Profile

2. What top 3 outcomes do we help create for our clients? (Customer focused)

3. What makes us stand out from the crowd?

What are your prospects/ clients main priorities?

Top on boarding questions to answer for your new team member:

4. How do we position ourselves in the marketplace?

**5. What are the questions I should be asking?
Frequently asked ones?**

Quality:	1.
Service:	2.
Price:	3.
6. What kind of objections/resistance will I hear?	How do I handle them?

1.

1.

2.

2.

3.

3.

In less than one year, 80% of new clients should align with your ICP.



7. Who are our top 3 major competitors?		8. What do they say about us?
1.		
2.		
3.		

9. What are their strengths and weaknesses?			
Competitor	Strengths	Weaknesses	Opportunities
1.			
2.			
3.			

10. Top 5 clients in order		Top 5 targets in order of potential	
1.		1.	
2.		2.	
3.		3.	
4.		4.	
5.		5.	

11. ICP 1 - What do they look like?			
Industry / Profile	Core Market	Secondary	Location / Region
Revenue	Head Count	Structure	Strategy
Hiring / Roles?	Media (Y/N)	Share Price	Industry Issues?

ICP 2 - What do they look like?			
Industry / Profile	Core Market	Secondary	Location / Region
Revenue	Head Count	Structure	Strategy
Hiring / Roles?	Media (Y/N)	Share Price	Industry Issues?

12. Provide them with a sales playbook

Sales Messaging - What does the first call sound like? Messaging is always "outcome focused".

Elevator pitch	
Value proposition	

Tip: Make sure you provide positioning statements for use in calling prospects, then debrief after calls and review success. Continue working on your Value Proposition and sales messaging. This helps with conversations, presentations, proposals and objections.

13. What is our sales process? Explain to each new salesperson your company's sales best practices.

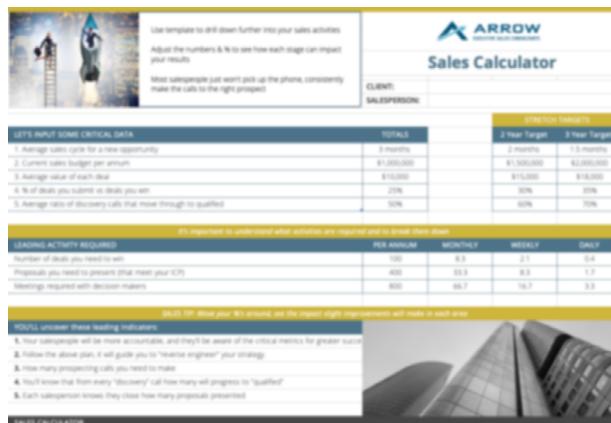
Sit inside sales team that handles the front end of the sales process, to learn how to effectively qualify an opportunity, before learning how to close one. What tools are available to support us to move opportunities through the pipeline?

14. Sales meetings / weekly 1:1's / metrics

	Day	Time	Notes
Territory planners due			
Calls logged into CRM			
Call report in CRM			
Pipeline maintenance			
Weekly coaching 1:1			
Sales meeting			

15. Do this at the start to understand metrics

*Request your link to the Sales Calculator.



Do this at the end before KPI Activity

16. Expectations for leading activities / accountability / goals

		30-Day Benchmark		60-Day Benchmark		90-Day Benchmark	
Your top 5 Metric or KPI		Goal	Actual	Goal	Actual	Goal	Actual
1. Phone calls / day							
2. Meetings / day							
3. Prospect meetings / week							
4. Proposals presented							
5. Deals → Win							

Salesperson

Date

Manager

Date

Your metrics or KPI's should be leading performance indicators that drive revenue.