



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.