Sales Onboarding Framework

Overview

This 30–60–90 day onboarding ecosystem accelerates sales readiness by combining instructional design, data-driven enablement, and continuous improvement. It reduces ramp time, increases confidence, and links learning directly to performance metrics.

Pre-Onboarding: Welcome & Introduction

Objective: Establish foundational context, prepare new hires technically, and introduce organisational culture.

Focus Areas

- Company mission, values, and product ecosystem overview
- Orientation to customer segments and typical use cases
- Early social connection (buddy assignment, welcome channel)
- Baseline skills check to tailor upcoming micro-learning

Measurement

- Completion confirmation
- Skills self-assessment

30-Day Phase: Learn

Objective: Build foundational product fluency, customer understanding, and cultural alignment.

Focus Areas

- Global onboarding workshops (values, compliance, DEI)
- Product training across core solution areas
- Buyer persona briefs (retail, hospitality, online)
- Capstone simulation to validate product knowledge
- CRM fundamentals + micro-refreshers

Measurement

- Engagement and participation
- Product certification score

- Simulation rubric outcomes
- CRM adoption baseline

60-Day Phase: Apply

Objective: Shift from structured learning to field practice with guided coaching.

Focus Areas

- Shadowing and field exposure (virtual or onsite)
- Live prospecting with deliberate practice drills
- Conversation intelligence insights (talk/listen ratios, keywords)
- Weekly coaching cadence (rubric-based)
- Peer learning through deal clinics and debriefs

Measurement

- Manager sign-off on field activities
- Call quality score improvements
- Qualified opportunities created
- Peer feedback scores

90-Day Phase: Optimize

Objective: Achieve autonomy and measurable contribution to pipeline performance.

Focus Areas

- Full quota engagement with leading-indicator tracking
- Proficiency certification (CI trends, rubric, manager endorsement)
- Customer Ownership Project (territory or account plan)
- Cross-functional micro-rotations (product, support)
- Continuous improvement cycles

Measurement

- Pipeline coverage and conversion indicators
- Certification score
- Account plan quality
- Participation in refreshers and enablement sprints

Data, Analytics & Insight Loop

- CRM and LMS dashboards track readiness, activity, and performance
- Behavioural analytics identify learning gaps
- Micro-content recommendations generated from performance data

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Design Principles

- **Enablement over training:** Learning aligned to business outcomes
- **Micro-learning loops:** Short, contextual interventions
- **Analytics-driven iteration:** Each module refined through data
- **Scalable & localised:** Adaptable across regions and markets
- **Ethical & adaptive learning:** Responsible use of AI to personalise development

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Outcome

A flexible onboarding ecosystem that accelerates time-to-productivity, strengthens confidence, and builds consistent capability across a distributed sales organisation.