**How to Use This Template**

Thanks for downloading HubSpot’s Sales Training Template!

This tool was built for you to outline necessary training steps and information for members of your sales team. Included are sections common in most sales training plans, as well as prompts for you to fill out your company’s tactics and information.

**Simply erase *the italicized instructions and examples* in each section and replace them with what makes sense for your business.**

Once complete, this plan can be used to help onboard BDRs, sales reps, field reps, territory account executives, sales associates, and everyone else involved in the hands-on sales process.

Keep in mind, this template is designed to be completely customized by your company. If you feel there are sections included that you would rather omit, or if you think a section is missing, you are encouraged to make those changes as you see fit for your business and new employees.

[Click here to get started with HubSpot Sales Software for free.](https://hubs.ly/H0gkTl60)

**[Name] Onboarding Plan**

* **Department/Role/Region:** *Sales Manager – Hawkins, Indiana*
* **Manager/Reporting To:** *Jim Hopper*
* **Department Head:** *Martin Brenner*
* **Coach/Mentor:** *Steve Harrington*

**Welcome!**

*Reinforce your excitement for this new hire to join your company. Remind the new hire that this is not a complete list of their role expectations, nor is it a contract or employee handbook. Instead, it is a collection of the fundamental tasks and resources to help the new hire ramp up, onboard, and succeed in their role long term.*

**Training**

*Provide the details for the new hire’s training, including:*

* *Timeline for training and schedules for specific sessions.*
* *Details on what each session/priority will entail.*
* *Expectations from training, such as a final project, presentation, or pitch.*

**Tech Set Up**

*Explain what technologies will be made available to the new hire to help in his or her role. If setup is required (i.e. connecting to the printer), provide instructions or name the individual/team who can provide instructions for setup.*

* *Computer information.*
* *Phone information.*
* *Monitor information.*
* *Printer information.*

**Software and Operating Systems**

*Also, identify and link to the software required for the role. Provide setup instructions or resources, if necessary.*

* [*CRM Software*](https://hubs.ly/H0g0sqn0)
* *Sales Enablement Software*
* *Customer Communication Software*
* *Company Wiki*
* *Video/Virtual Meeting Software*

**Internal Communications**

*Should this new hire be on any email aliases/distribution lists? Are there any channels for them to join on slack? Is there a calendar or place where they should record vacation and time off? Outline those here.*

Email Aliases to Join

* *Example 1*
* *Example 2*
* *Example 3*

Slack Channels to Join

* *Example 1*
* *Example 2*
* *Example 3*

Calendars to Add

* *Example 1*
* *Example 2*
* *Example 3*

**Benefits**

*Most of this will be covered by HR during orientation, but if there is anything additional to be completed in the first 100 days, outline that here.*

**People to Meet**

*Who are the people this new hire should connect with soon after starting? Provide the person’s name, role, and talking points to help make the 1:1 productive for both parties.*

* ***Mike Wheeler****. Territory Account Executive, Hawkins, Indiana. Mike will be your partner in the Hawkins area. In the meeting, ask him about his closing tactics for the area and if he could connect you to his happiest clients to learn more from their success.*
* ***Dustin Henderson:*** *Director of Sales, Indiana. While you won’t report directly to Dustin, he has an impressive lay of the land for the state. Ask him how he goes about goal-setting for his territory and what he most wants to see out of sales reps out in the field.*
* ***Joyce Byers:*** *HR Business Partner, Sales & Marketing. Joyce will be your liaison for any HR or business inquiries. Talk with her about how to best keep the line of communication open and what the best ways are to discuss any HR issues that may arise.*
* ***Billy Hargrove****: Product Manager. Ask Billy what’s on the horizon for the next six months and what features his team is most excited about.*
* ***Jane Ives:*** *Sales Engineer. Connect with Jane to learn more about the sales engineering connections you should be making in your first month or two.*

**100 Day High-Level Goals**

*At a high level, what do you want this new hire to be able to do by the end of his or her first 100 days?*

At the end of your first 100 days, you should be able to:

1. *Meet or exceed quota on a monthly basis.*
2. *Identify and partner with 1-2 existing customers to be an advocate or referrer for new business.*
3. *Understand how to source, connect with, demo the product for, negotiate with, and close new contacts into deals.*
4. *Build a territory plan.*

**Month 1: *Date* - *Date*.**

*Month #1 should be about getting started on the right foot. Goals in terms of driving revenue for the business should be small, if not saved for a later time. New hires should emerge from this month with knowledge of the product, pricing, competition, and existing collateral. If there is any quota in the first month, consider time and prior experience before setting it, and try to keep it reasonable.*

*Below, outline the* ***goal(s)*** *for month #1, what* ***deliverables*** *(if any) are expected, how success will be* ***measured****, and any* ***resources*** *that will help the new hire get his or her work done.*

**Goal**: *Be able to concisely and effectively communicate the value of our product.*

**Deliverable / Measurement of Success:** *Pass the company “Pitch Competition,” which you will present in front of our Board of Advisors.*

**Resources:** *Link to Pitch Deck Instructions*

**Goal**: *Connect with 100 opportunities.*

**Deliverable / Measurement of Success:** *100 phone calls.*

**Resources:** *BDR Team*

**Month 2: *Date - Date.***

*Month #2’s focus should be on putting month #1’s learnings into action. Expectations should be reasonable, depending on the new hire’s level of experience. It’s also a chance to expand company/product knowledge through conversations with customers and partners.*

**Goal:** *Reach out to ## of new contacts, converting 50% into the next stage of the buyer’s journey.*

**Deliverable / Measurement of Success:** *## New Opportunities*

**Resources:** *Your fellow TAE, Mike, can help you make connections.*

**Goal:** *Speak to two existing customers in your territory and learn their pain points and favorite parts of the product.*

**Deliverable / Measurement of Success:** *## New Opportunities*

**Resources:** *The customer marketing and account management teams*

**Month 3: *Date - Date***

*The third month should see salespeople springing into action. Goals should start to get more aggressive, as the rep should be reasonably armed for success at this point.*

**Goal #1:** *Reach out to ## of new contacts, converting 50% into the next stage of the buyer’s journey.*

**Deliverable / Measurement of Success:** *## New Opportunities*

**Resources:** *Your fellow TAE, Mike, can help you make connections.*

**Goal #2:** *Close one deal.*

**Deliverable / Measurement of Success:** *See above.*

**Resources:** *Your fellow TAE, Mike, can help you with paperwork and negotiations.*

**Feedback and Reviews**

*Outline your cadence for feedback and managerial reviews. Also, identify what should be prepared before these reviews, if anything. This would also be the section to explain how managerial 1:1s will take place.*

**Weekly 1:1s:** *Day of Week/Time*

**30-Day Check-In:** *Date*

**50-Day Check-In:** *Date*

**100-Day Review:** *Date. Please come prepared with your performance metrics to date, and fill out the self-evaluation survey.*

**[Company Name] Sales Strategy and Methodology**

*Every company does sales at least a little differently than every other. Explain your process for quota setting, competition, go-to-market, and prospecting. If you have an existing sales plan, link it here. If not, build a sales plan using* [*this template*](https://hubs.ly/H0gkSNY0)*.*

**Required/Suggested Reading**

*If there is any documentation or any resources new hires should or must read, outline them here. These can be anything regarding company culture, role expectations, organizational leadership, or whatever is deemed mandatory. You could also style this as an FAQ section.*

* *Article on team outings.*
* *Article on expensing.*
* *Article on time off policy.*
* *Article on our relationship with marketing.*
* *Article on sales in your area.*
* *Video introduction from our CEO.*
* *Company M-SPOT.*

**Resources for Your Success**

*Identify the people, places, and things that exist within the company. These can be mentors and leaders, after-work groups, sales hacks and tips, and more.*

* *Our #sales-emergency Slack channel.*
* *Your mentor, Steve, and your manager, me!*
* *Your product trainers, Max & Lucas.*
* *Our sales best practices video series.*
* *Recordings of successful and failed sales calls.*
* *Article on how to conduct a demo.*

**[](https://hubs.ly/H0g0sq50)**

**Set your sales team up for instant success.**

HubSpot’s free CRM and integrated [sales software](https://hubs.ly/H0gkTl60) are a dream come true for companies looking to equip their sales teams with the software that makes their jobs easier and their work more effective.

HubSpot helps you build a contact database, connect with new leads, close deals faster, and manage your pipeline with its integrated CRM and sales software. Track and send emails, manage client meetings, effortlessly access documentation, and build out helpful contact reports.

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