



# ONE YEAR SALESPERSON ONBOARDING PLAN

## SETTING YOUR SALESPERSON UP FOR SUCCESS

Once you extend a job offer, the work of integrating your new salesperson into the company and your team should begin. With little to no communication between job offer and their first day, your new salesperson begins to feel uneasy - reach out and continue to have dialogue. Once they arrive, having a well-laid-out onboarding process will make them feel welcome and will allow them to focus on what you hired them to do - grow sales.

### OBJECTIVES

- 01** To positively reinforce the decision that your new salesperson made when deciding to join your company.
- 02** To provide your new salesperson with the necessary tools and training to be successful in their role.
- 03** To set clear expectations of your new salesperson from the very beginning.



## »» Before the Salesperson's Start Date

### Schedule and Job Duties

- Complete internal paperwork with approvals
- Call the salesperson:
  - Confirm start date, time, place, parking, dress code, etc.
  - Identify computer needs and requirements
  - Provide the name of their onboarding mentor
  - Remind them to complete new hire paperwork
- Add regularly scheduled meetings (e.g. staff and department) to their calendar
- Prepare their calendar for the first month
- Identify their focused list of accounts
- Finalize their quota and compensation plan

### Socialization

- Send company email informing of the new hire, including start date, their role, and bio
- Select a mentor
- Arrange for lunch with the appropriate person(s) or mentor for the first day and during first week
- Meet with the mentor, and provide suggestions and tips
- Arrange for a building tour

### Work Environment

- Put together welcome packet from the department and include: job description, welcome letter, contact names and phone lists, building map, mission and values of the company, information on your team, etc.
- Clean the work area and set up cube/office space with supplies
- Order office or work area keys
- Order business cards and name plate
- Add the salesperson to relevant email lists

### Technology Access and Related

- Order technology equipment (e.g. laptop, printer) and software
- Contact IT to have the system set up in advance
- Arrange for phone installation



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## »» **First Day**

### Schedule, Job Duties, and Expectations

- Clarify the first week's schedule and confirm required and recommended training
- Review their territory and list of accounts
- Review their quota and compensation plan
- Review job description, outline of duties, KPI's, and expectations
- Describe how the month will unfold, as it relates to travel
- Describe how their job fits in the team, and how the job and sales team contribute to the overall company
- Explain policies and procedures for vacation and sick time, holidays, etc. Explain any flexible work policies or procedures

### Socialization

- Be available to greet the salesperson on the first day
- Introduce the salesperson to others in the workplace
- Take the salesperson out to lunch
- Provide a list of the employees they should contact and get to know and the timetable within which to do so
- Introduce them to their workplace

### Work Environment

- Give the salesperson key(s) and building access card
- Take them on a building tour
- Explain how to get additional supplies

### Technology Access and Related

- Provide information on setting up voicemail and laptop



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## »» **First Week**

### Schedule, Job Duties, and Expectations

- Debrief with the salesperson after they attend initial meetings and training. Touch base quickly each day
- Explain the annual performance review and goal-setting process
- Provide training on the CRM system
- Begin product training
- Describe group sales meetings and one-on-one meeting process and cadence
- Review the process related to the probationary period (if applicable)

### Socialization

- They should continue to contact the list of employees you provided to get to know them within the timetable provided
- They should have someone assigned to go to lunch with them each day

### Technology Access and Related

- Ensure the salesperson has a fully functioning computer and systems access and understands how to use them
- Provide username and access to the CRM



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## »» **First Month**

### Schedule, Job Duties, and Expectations

- Schedule and conduct regularly occurring one-on-one meetings
- Schedule and conduct group sales meetings
- Continue product training
- When applicable, have the salesperson roleplay competency selling each product
- Continue to provide timely, on-going, meaningful "everyday feedback"
- Elicit feedback from the salesperson and be available to answer questions
- Explain the performance management process
- Discuss performance and professional development goals
- Have them demonstrate competency on the CRM

### Socialization

- Continue introducing them to key people and bring them to relevant events
- Meet with the salesperson and mentor to review first weeks and answer questions

### Training and Development

- Week 2 - Have the salesperson travel with an experienced salesperson in their territory so they can observe them with their accounts
- Week 3 - Co-travel with the salesperson in their territory
- Week 4 - Have the salesperson travel in their territory on their own



## »» **First Three Months**

### Schedule, Job Duties, and Expectations

- Continue having regularly occurring one-on-one meetings
- Continue having group sales meetings
- Meet for informal three-month performance check-in
- Co-travel with the salesperson again towards the end of the third month to gauge process and identify any additional training needs
- Create written performance goals and professional development goals

### Socialization

- Have a check-in with the salesperson and mentor
- Take the salesperson out to lunch, and have an informal conversation about how things are going

### Training and Development

- Ask if needed training is completed

## »» **First Six Months**

### Schedule, Job Duties, and Expectations

- Conduct six-month performance review
- Review progress on performance goals and professional development goals
- Co-travel again with the salesperson, as needed

### Socialization

- Create an opportunity for the salesperson to attend or be involved in an activity outside of their work area
- Meet with them and their mentor at the end of their structured mentor-relationship. Discuss how things went and what else would be helpful for the salesperson



## »» **First Year: Between 6 and 12 Months**

### Schedule, Job Duties, and Expectations

- Celebrate successes and recognition of the salesperson's contributions
- Continue providing regular informal feedback; provide formal feedback during the annual review process
- Have a conversation with them about their experience to date

### Socialization

- Solicit their feedback and suggestions on ways to improve the onboarding experience. Do this one-on-one or with a small group of new salespeople

### Training and Development

- Discuss their professional development goals and identify relevant learning opportunities



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## Key Takeaways

It is important to make sure that any relationship starts off on the right foot. Since the first experiences of a new salesperson are critical, proper onboarding ensures that this relationship starts off as both parties had hoped.

Onboarding is not a static event that ends after one or two weeks and involves only the new hire's manager. It is a process that continues to take place over many months and involves their manager, mentor, key members of other departments, Human Resources, etc.

Make sure you and the salesperson are in alignment on the sales plan. Confirm they have the tools, processes, and resources they need to be successful, and establish how you will work together and communicate effectively to ensure success.



## Notes