

First 30 Day Onboarding Plan



SUBJECT	ACTIVITY / COURSE DESCRIPTION	TIME	WHO	COMPLETION CRITERIA
Pre-Arrival Start Up Guide	Set of orientation information and instructions Reading material	-1 week	Sales Manager	<ul style="list-style-type: none"> Material received
Assign a "Mentor"	A "Mentor" is someone who is partnered with a new hire during the first 90-days of employment to offer advice and guidance in helping foster and promote skill and professional development	-1 week	Sales Manager	<ul style="list-style-type: none"> Mentor assigned Initial Mentor call scheduled
Orientation Checklist	Where is everything online? Logistics / timelines Reading material	Day 1	Sales Manager	<ul style="list-style-type: none"> Checklist and guide reviewed with Sales Manager
Schedule of Events and Meetings	IT / Phone setup HR/Payroll/Benefits Conference call setup (phone + web) Travel & Expenses setup Orientation with Sales Manager Milestone creation/rep scorecard review Review material in startup guide Set checkpoint schedule with Sales Manager Set checkpoint schedule with Mentor Set travel schedule	Day 1-3	Sales Manager	<ul style="list-style-type: none"> Laptop Mobile Device(s) Access to all portals Schedules and travel set
Key Contact Roles and Responsibilities	Schedule meetings with key contacts Cheat sheet of questions/discussion points for both participants	Week 1-2	Sales Manager	<ul style="list-style-type: none"> Cheat sheet completed
Sales Process	How to use CRM - Creating Accounts/ Opportunities/Contacts Pricing & generating quotes Pricing approval process Review of legal/contractual requirements Comp Plan review Lead generation & Pipeline review process	Week 1-2	Sales Ops	<ul style="list-style-type: none"> CRM access & familiarization Understanding of comp plan structure Can create a Account, Contact, Opportunity & Quote Understand legal/ contracts process Understand pricing approval process
Product Training	Value Proposition Common use cases Competitive Landscape	Week 2-3	Product Team	<ul style="list-style-type: none"> Articulate value prop Articulate use cases High-level Product demo
Sales Tools	CRM Dashboards Account Plans Sales collateral (demos, whitepapers, case studies, etc.) Sales decks	Week 3	Sales Manager	<ul style="list-style-type: none"> Proficiency in CRM dashboards Access to Sales collateral & Sales Decks

Performance metrics	Quota ramp Milestones and dates Review rep expectations per scorecard	Week 3	Sales Manager	<ul style="list-style-type: none"> Understand quota attainment ramp Understand ramp competencies and accountabilities
Marketing & Lead Generation	Session with Marketing to cover: <ul style="list-style-type: none"> - Website - Campaigns - Data management - Lead Management 	Week 4	Mktg	<ul style="list-style-type: none"> Understand how the marketing engine works and Rep's role

