

# 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"> <li>Material received</li> </ul>
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"> <li>Mentor assigned</li> <li>Initial Mentor call scheduled</li> </ul>
Orientation Checklist	Where is everything online? Logistics / timelines Reading material	Day 1	Sales Manager	<ul style="list-style-type: none"> <li>Checklist and guide reviewed with Sales Manager</li> </ul>
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"> <li>Laptop</li> <li>Mobile Device(s)</li> <li>Access to all portals</li> <li>Schedules and travel set</li> </ul>
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"> <li>Cheat sheet completed</li> </ul>
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"> <li>CRM access &amp; familiarization</li> <li>Understanding of comp plan structure</li> <li>Can create a Account, Contact, Opportunity &amp; Quote</li> <li>Understand legal/ contracts process</li> <li>Understand pricing approval process</li> </ul>
Product Training	Value Proposition Common use cases Competitive Landscape	Week 2-3	Product Team	<ul style="list-style-type: none"> <li>Articulate value prop</li> <li>Articulate use cases</li> <li>High-level Product demo</li> </ul>
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"> <li>Proficiency in CRM dashboards</li> <li>Access to Sales collateral &amp; Sales Decks</li> </ul>

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

