



# ONBOARDING PROCESS

## 90-Day Sales Manager Onboarding Plan

### Setting Your Sales Manager up for Success

Once you extend a job offer, the work of integrating your new Sales Manager into the company and your team should begin. With little to no communication between job offer and their first day, your new Sales Manager 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

1. To positively reinforce the decision that your new Sales Manager made when deciding to join your company.
2. To provide your new Sales Manager with the necessary tools and training to be successful in their role.
3. To set clear expectations of your new Sales Manager from the very beginning.

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## Days 1 – 30

### Discuss current sales team.

- ☐ Provide a general overview of the team without providing too much detail – let the new Sales Manager form their own opinions.
- ☐ Disclose any current/active disciplinary actions that the Sales Manager needs to be aware of.
- ☐ Make the Sales Manager aware of the sales team's culture.
- ☐ Share the identity of any informal leaders within the sales team.

### Educate them on your business and products.

- ☐ Train on company and product/services knowledge.
- ☐ Share sales requisite activities, processes, tools and resources.
- ☐ Educate on customer/buyer knowledge.
- ☐ Train on tools and systems and share related knowledge and capability (CRM).

### Review goals.

- ☐ Review current sales and pipeline report. Develop and deliver a scorecard that clearly outlines their goals for the first 90+ days.
- ☐ Make sure the scorecard has clear objectives and outlines their sales and professional goals for the year.
- ☐ Use the scorecard as a guide for managing and sharing updates at one-on-one meetings.

### Connect them internally.

- ☐ It is important for your new Sales Manager to get to know the key people in the organization who will help them be effective.
- ☐ Provide a framework for each employee they should contact and the timetable they should do so in.

### Schedule sales meetings.

- ☐ Set up weekly one-on-ones.
- ☐ Make sure you communicate frequently for the first 90 days. Schedule regular meetings and drop by to see how the Sales Manager is coming along. This is key to establishing open communication from the start.
- ☐ Attend sales team meeting.
- ☐ Have them observe and ask questions for the first one or two.

### Start ride-a-longs.

- ☐ Schedule at least one with each sales rep.
- ☐ Blend of existing clients and prospect meetings.
- ☐ You may also want to travel with them on a few of these, if appropriate.

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## Days 30 – 60 ►

**Start having Sales Manager take over sales team management.**

- ☐ They should continue with ride-a-longs.
- ☐ They should start providing feedback and coaching to sales reps.
- ☐ They should start having one-on-ones with each sales rep – a minimum of once a month.

**Begin having Sales Manager manage the sales team meetings.**

- ☐ They should be managing these by day 30.
- ☐ You should no longer need to attend these meetings (seek agreement with Sales Manager).

**Connect them externally.**

- ☐ Set up meetings with key partners/vendors to educate them on the relationships and how you work together.

**Continue with open dialogue.**

- ☐ Do a 30-day assessment meeting with the Sales Manager to get their overall thoughts and ideas on the sales team, processes and tools.
- ☐ Continue with one-on-ones. Check timing to see if still need weekly or move to bi-weekly.

## Days 60 – 90 ►

**Sales Team Management and Meetings.**

- ☐ They should be fully managing and coaching the team.

**Review the current sales pipeline report.**

- ☐ Discuss in detail the current sales and pipeline report to ensure you are both on the same page and aware of what is occurring over the next few months.

**Establish process for communicating sales updates.**

- ☐ Set clear expectations on how they will be regularly communicating with you on sales goals, pipeline progress, road blocks, sales team issues, etc.

**Seek feedback on how you can help them succeed.**

- ☐ Do they need more training, a mentor, more of your time, data, etc.?
- ☐ Seek feedback on how their onboarding went and how it could be improved.



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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 Sales Manager 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, mentors, key members of other departments, human resources, etc.
- Make sure you and the Sales Manager 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.



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