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# **Sales onboarding template**

| **How to use this onboarding template**This document is designed to be a practical guide for onboarding new sales team members, ensuring they quickly adapt to their new roles.Each section provides a framework for delivering essential information and fostering a smooth transition for new hires. **To use this template effectively, follow these simple steps:**1. **Customise:** Tailor each section to fit your company’s specific needs, values, and industry.
2. **Complete:** Fill in the details for each area, from company overview to training schedules.
3. **Engage:** Use the provided framework to plan and execute a comprehensive onboarding experience.

By systematically following the sections and filling in relevant information, you can create a robust onboarding process that sets your new sales hires up for success. |
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## **Welcome package**

### **Company overview**

*Fill in each section with concise, relevant information. This part of the template is crucial for aligning new hires with the company’s strategic framework and cultural ethos.*

* **A brief history**: Share the founding story, key milestones, and growth trajectory to give a sense of heritage and progress.
* **Competitors**: List significant competitors and a brief analysis of how your company differentiates itself.
* **ICPs and Buyer Personas**: Detail Ideal Customer Profiles (ICPs) and Buyer Personas, including demographic, firmographic, and psychographic characteristics.
* **Vision:** State the aspirational vision of the company's future.
* **Mission**: Explain the company's purpose and what it seeks to achieve.
* **Values:** Outline the core principles and beliefs that guide the company’s culture and decision-making.

### **Team introductions**

*Use this section to foster a sense of belonging and to help new hires understand the broader team dynamics and organisational structure.*

* **Sales team:** For each member, include their name, role, areas of expertise, and a fun fact to humanise the introduction. Ensure to highlight how their role contributes to the team’s success.
* **Leaders and Supervisors:** Provide a brief bio for each leader and supervisor, focusing on their vision for the team and expectations from new hires.
* **Other key departments:** List departments such as Marketing, Client Services, Tech, and HR. Explain briefly how these departments interact with Sales and the synergies expected.

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### **Contact list**

*Ensure contacts are up-to-date and include email addresses and phone numbers. This list is a quick reference guide for new hires navigating administrative processes.*

* **HR**: For onboarding paperwork, benefits information, and policy queries.
* **IT**: For tech setup, access issues, and technical support.
* **Office Manager**: For office logistics, supplies, and facilities issues.

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## **Training schedule**

### **Orientation date**

*Customise the orientation and training modules to suit the new hire's experience level and learning pace. Incorporate interactive elements like quizzes or role-play exercises to enhance engagement and retention. Schedule breaks and informal check-ins to provide support and gather feedback.*

Clearly outline the schedule for the first day, including a welcome meeting, HR orientation for paperwork, and an IT setup session.

### **Training modules**

*Use this section to foster a sense of belonging and to help new hires understand the broader team dynamics and organisational structure.*

Segment the training into specific topics, such as product knowledge, sales process, CRM software, and communication tools. Specify each module's objectives, key takeaways, expected outcomes, and time allocations.

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## **Tech setup and software training**

*Ensure new hires have immediate access to all necessary tech equipment and software. Consider a brief, hands-on session with IT support to address any initial setup questions or concerns.*

### **Hardware**

Provide a checklist of hardware items issued, such as laptops, mobile devices, and accessories. Include setup guides or links to online tutorials for self-service setup.

### **Software**

List essential sales and productivity software with installation instructions, login credentials, and primary uses. Highlight key features and best practices for each tool.

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## **Internal communications and people to meet**

*Use this section to encourage early and effective communication channels. Highlight the importance of these meetings for knowledge exchange, networking, and integration into the company culture.*

### **Meeting schedule**

Detail the cadence of sales team meetings, one-on-one sessions with the sales manager, and cross-departmental catch-ups. Include objectives and expectations for each meeting type.

### **People to meet**

Organise introductory meetings with key team members and leaders across the company. Briefly describe their roles and how they will interact with the new hire.

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## **Sales strategy and methodology**

*This section is crucial for aligning new hires with the company’s sales approach and market positioning. Emphasise real-world applications and encourage questions and discussions for deeper understanding.*

### **Sales playbook**

Dive deep into the sales playbook, outlining the sales cycle, engagement strategies, negotiation tactics, and closing techniques. Include case studies or examples for context.

### **Target market**

Provide detailed insights into the target market, including industry trends, customer pain points, and success stories of how your product/service solves specific problems.

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## **Required reading and resources**

*Foster a culture of continuous learning by recommending a mix of technical, sales, and industry-related resources. Schedule regular discussions to share insights and learnings.*

### **Product knowledge**

Assemble comprehensive product information, including spec sheets, FAQs, and key selling points. Incorporate training on the unique value proposition and competitive advantages.

### **Industry insights**

Curate a selection of industry reports, articles, and books that provide a broad perspective on the market landscape and future trends. Include resources on sales methodologies and personal development.

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## **Performance, development, and feedback**

*Establish a transparent and motivating system for setting goals, providing feedback, and facilitating growth. Encourage open dialogue about performance and aspirations.*

### **Sales targets**

Define clear, achievable sales targets and key performance indicators (KPIs) for the short and long term. Outline the process for tracking and reporting progress.

### **Evaluation criteria**

Specify the criteria for performance reviews, including sales results, customer feedback, and adherence to sales processes. Detail the schedule for formal evaluations and the format for feedback.

### **Growth opportunities**

Highlight opportunities for professional growth, such as training programs, mentorship, and potential career paths within the organisation.

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## **Continuous learning and development**

*Promote a culture of lifelong learning and professional growth. Encourage new hires to take initiative in their development and provide support to facilitate their progress.*

### **Ongoing training**

Schedule advanced training sessions on products, sales techniques, and market developments. Include opportunities for certifications or specialised training.

### **Sales conferences and workshops**

List upcoming industry conferences, workshops, and seminars that could benefit the salesperson’s development and networking.

### **Professional development budget**

Explain any available budgets for courses, books, or conferences, including how to request and utilise these funds.

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## **Feedback and evaluation**

*Foster an environment where feedback is regularly exchanged and acted upon. Ensure new hires understand the value of constant learning for their growth and the team's success.*

### **Initial review schedule**

Set dates for initial performance reviews and feedback sessions to discuss integration, learning progress, and any early challenges.

### **Continuous feedback mechanism**

Outline the process for ongoing feedback, including regular check-ins with the sales manager and peer reviews. Highlight the importance of constructive feedback for personal and professional development.

### **Improvement plan**

Provide guidelines for creating and implementing personal improvement plans, including setting specific goals, actions, and timelines for reassessment.