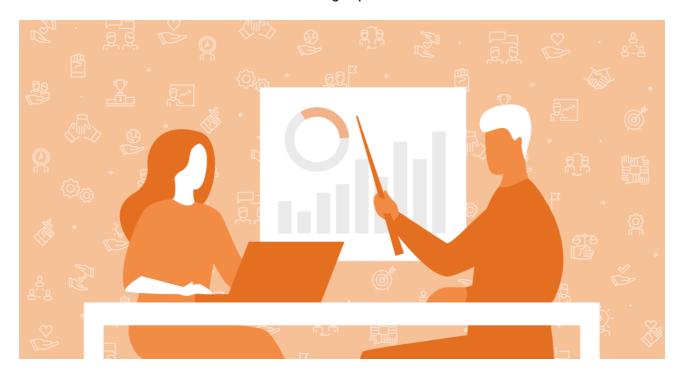
Onboarding Checklist: Sales Employee

Follow these processes to ensure your new sales employee has a personalized and professional onboarding experience.



DOCUMENTS & SET UP

Set up sales employee's tools and communication
Sign contract agreement
W-9 or W-2
Welcome packet and orientation packet
Company culture documents (include professional ethics and the code of conduct)
Compensation and benefits documents
Job description and responsibilities
New hire training manual
Sales training material and manual
New hire introduction to other employees
SALES TRAINING
SALES SOFTWARE (Set up training on sales software tools and communication)
SALES TRAINING (Partner with another sales employee to assist with training)
PRODUCT KNOWLEDGE (Set up training and overview of company product, service, etc)
SALES SOFTWARE (Walk employee through sales software)

TRAINING MATERIALS (Walk employee through training manual (or videos))
SALES APPROACH (Set up practice sales examples including sales pitch, common product questions, service questions, up-selling services, etc
SALES SCRIPTS (Walk employee through sales scripts)
CLOSING A SALE TRAINING AND TECHINQUES (walk employee through how to close and techniques to use when trying to close a sale or sign a customer up for a service)
BEST PRACTICES (Walk employee through the dos and don't with potential customers)
SALES PHONE TRAINING (tone, speak clearly and slowly, etc)
CONTINUED SALES TRAINING
SALES TEST RUN (partner will assist with calls/emails, practice sales calls, etc)
FEEDBACK (things to review/work on)
ADDITIONAL TRAINING (additional assignments, test runs, etc)
SET PERFORMANCE GOALS
PRAISE (positive feedback/boost confidence)
QUESTIONS AND CONCERNS (let new employee give feedback or ask questions)
CHECKINS (one month, three month, six month)
SALES GOALS CHECKIN
■ EMPLOYEE ONBOARDING REVIEW AND QUESTIONNAIRE (give employee on Make and Share Free Checklists checkli.com