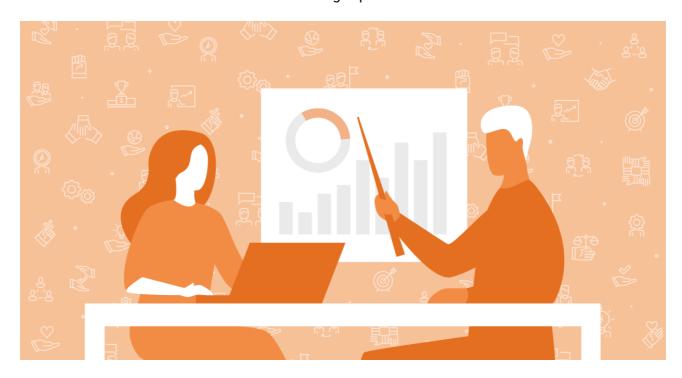# Onboarding Checklist: Sales Employee

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 onboarding survey)