

# Sales Onboarding Checklist



Successful onboarding — and having a plan for it — can make all the difference for a new sales hire. A well-planned onboarding dramatically shortens your new hires ramp to quota, helping them to start selling quicker and generate more revenue, faster.

But the training and learning shouldn't stop once a new rep is assigned their first territory. It should be an ongoing process of continuous evaluation and improvement. That's why we believe a shift in thinking is necessary — moving from the "onboarding" mindset to "**everboarding.**"

With the use of micro-learning and effective coaching, this philosophy of everboarding helps close knowledge and skill gaps and significantly improves the lifetime revenue generated by each rep.

That's why we created this Sales Onboarding Checklist, walking you through how you can ramp up your new reps quickly, get them selling faster, and provide them the tools they need to continually improve as they begin their careers.

Successful onboarding improves new hire win rates by **14%** and increases revenue per-hire by **51%**.



## Before Day 1

Having a team, a plan, and a platform in place before your new hire begins is critical to setting them up for success. Use your training and onboarding platform to prepare the following before their first day:

- Assign a learning path for your new hire.
- Provide context about your industry, competition, and brand.
- Integrate your onboarding/training platform with your CRM.

## First 30 Days

In the first 30 days, you'll want to meet with your new hire to understand their own personal background and skill set, and tweak their learning path and course materials to fill in the skill and knowledge gaps they may have.

- Assign course materials to ramp new hire on your sales org, buyer personas, products, and CRM.
- Schedule video learning sessions with top-performing sellers.
- Provide recorded win/loss calls to study.
- Provide sales deck and messaging training to review.
- Assign materials and videos on the organization's sales process.
- Have new hire sit in on live demos.
- Offer gamification modules to promote engagement with training.

## First 60 Days

As their knowledge begins to deepen, gamification becomes extremely important to help make sure your new hire stays engaged with their training materials. This is also where micro-learning helps boost retention and where analytics can show you in which areas they may need extra help to reach their maximum selling potential.

- Assign course materials to deepen understanding of major competitors, how to generate leads, and how to qualify leads.
- Assign new hire a simulated scenario to manage such pitch practice.
- Continue gamification learning and certification with quizzes, polls, and surveys.
- Study onboarding analytics and heat maps to begin skills remediation where necessary.
- Certify skills with video role play with manager.

## First 90+ Days

Once you've taken most of the training wheels off your new hire, it's important to continue to support them — this is where “everboarding” really becomes important.

- Assign course materials on how to pitch and close deals and how to handle objections.
- Schedule ongoing video learning with top sellers based on new hire's performance.
- Schedule ongoing territory reviews, including watching calls and reviewing prospect communication.
- Assign ongoing micro-learnings weekly or monthly based on known skill gaps.

## About Us

MindTickle offers the industry's most comprehensive sales readiness solution for closing the knowledge and skill gaps found in customer-facing teams. Organizations across a wide range of industries use MindTickle's award-winning platform to train, coach, and align their teams to make end-users and their managers more effective.