SALES REP ONBOARDING TEMPLATE

Recap with Sales

Team Happy Hour

Manager

3:30 PM

4:00 PM

WEEK 1									
WEEK 1	DAY 1	WEEK 1	DAY 2	WEEK 1	DAY 3	WEEK 1	DAY 4	WEEK 1	DAY 5
9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival, Weekly team meeting	9:00 AM	Arrival
9:15 AM	Introductions to team, office tour, coffee and bagels (Sales Team)	9:30 AM	Training - Cold Call and Appointment Setting - Scripts, Procedures (Sales Manager)	9:30 AM	Training - Product Knowledge (Product Team)	9:30 AM	Training - cold emails - Scripts, Procedures (Sales Manager)	9:30 AM	Selling
10:15 AM	Meeting with peer mentor and sales manager to explain peer mentor's role	11:30 AM	Selling	11:30 AM	Selling	11:30 AM	Selling	1:00 PM	Lunch Break
10:45 AM	Guide to work station, introduce technology, pass keys	1:00 PM	Lunch Break	1:00 PM	Lunch Break	1:00 PM	Lunch Break	2:00 PM	Training - Our main markets
11:00 AM	Orientation Part 1 - Online training introducing company history, product, mission statement	2:00 PM	Mock Calls with Peer Mentor or Sales Team	2:00 PM	Mock Calls with Peer Mentor or Sales Team	2:00 PM	Call review analysis (Sales Manager)	3:00 PM	Selling
12:00 PM	Lunch Break	3:00 PM	Selling	3:00 PM	Selling	3:00 PM	Selling	5:00 PM	Check-in with Manager
1:00 PM	Orientation Part 2 - Online slideshow - Sales Team Processes and Procedures, Sales Funnel, Key Metrics, Expectations	5:00 PM	Check-in with Manager	5:00 PM	Check-in with Manager	5:00 PM	Check-in with Manager		1
2:00 PM	Meet with HR - Benefits, Forms, Compensation, Questions								

WEEK 2									
WEEK 2	DAY 1	WEEK 2	DAY 2	WEEK 2	DAY 3	WEEK 2	DAY 4	WEEK 2	DAY 5
9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival, Weekly team meeting	9:00 AM	Arrival
9:30 AM	Sales team building activity	9:30 AM	Training - Managing objections (online)	9:30 AM	Selling	9:30 AM	Training - Managing objections (online)	9:30 AM	Marketing and Sales Sprint meeting
10:30 AM	Selling	11:30 AM	Selling	1:00 PM	Lunch Break	11:30 AM	Selling	11:30 AM	Selling
1:00 PM	Lunch Break	1:00 PM	Lunch Break	2:00 PM	Selling	1:00 PM	Lunch Break	1:00 PM	Lunch Break
2:00 PM	Selling	2:00 PM	Mock demos	5:00 PM	Check-in with Manager	2:00 PM	Mock demos	2:00 PM	Selling
5:00 PM	Check-in with Manager	3:00 PM	Selling			3:00 PM	Selling	4:00 PM	Practice elevator pitch
_		5:00 PM	Check-in with Manager			5:00 PM	Check-in with Manager	5:00 PM	Check-in with Manager

WEEK 3									
WEEK 3	DAY 1	WEEK 3	DAY 2	WEEK 3	DAY 3	WEEK 3	DAY 4	WEEK 3	DAY 5
9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival, Weekly team meeting	9:00 AM	Arrival
9:30 AM	Training - expense reporting system	9:30 AM	Training - USP for oil and gas industry	9:30 AM	Training on USP for major construction industry	10:00 AM	Selling	9:30 AM	Training - closing techniques
10:00 AM	Selling	10:30 AM	Selling	10:30 AM	Selling	1:00 PM	Lunch Break	11:00 AM	Selling
1:00 PM	Lunch Break	1:00 PM	Lunch Break	1:00 PM	Lunch Break	2:00 PM	Selling	1:00 PM	Lunch Break
2:00 PM	Selling	2:00 PM	Call review	2:00 PM	Selling	5:00 PM	Check-in with Manager	2:00 PM	Selling
3:00 PM	Sales Team skill building, dinner	3:00 PM	Selling	5:00 PM	End			5:00 PM	End

5:00 PM

Mock demos

5:00 PM

End

WEEK 4							
WEEK 4	DAY 1	WEEK 4	DAY 2	WEEK 4	DAY 3	WEEK 4	DAY 4
9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival	9:00 AM	Arrival, Weekly team meeting
9:30 AM	Selling	9:30 AM	Sales monthly review	9:30 AM	Training - USP for Automotive Industry	10:30 AM	Selling
1:00 PM	Lunch Break	11:00 AM	Selling	10:15 AM	Selling	1:00 PM	Lunch Break
2:00 PM	Selling	1:00 PM	Lunch Break	1:00 PM	Lunch Break	2:00 PM	Selling
4:00 PM	Networking happy hour	2:00 PM	Selling	2:00 PM	Selling	4:00 PM	Team community service serve dinner at homeless shelter
		4:30 PM	Individual coaching, performance assessment	4:00 PM	Call review		
				5:00 PM	End		