

WEEK 1 START DATE	
EMPLOYEE	
MANAGER	

WEEK 1

TASK	RESOURCE	STATUS
Onboarding plan overview	Sales Leader	○ ○ ○
Employment Contracts signed	Sales Leader	○ ○ ○
Meet & Greet with all staff	CEO	○ ○ ○
Review and sign compensation plan	Sales Leader	○ ○ ○
Lunch with manager	Sales Leader	○ ○ ○
Access to all required systems (email, portal, crm, etc.)	HR / Office Manager	○ ○ ○
Access to building and office	HR / Office Manager	○ ○ ○
Strategic Corporate Plan review	CEO	○ ○ ○
Overview Company Vision, Values, Mission	CEO	○ ○ ○
Organizational chart review	Sales Leader	○ ○ ○
Market overview	Sales Leader	○ ○ ○
CRM Overview	Sales Leader	○ ○ ○
Introduction meeting with Sales Team	Sales Leader	○ ○ ○
Introduction meeting with [Department A]	Department A Leader	○ ○ ○
Introduction meeting with [Department B]	Department B Leader	○ ○ ○
Introduction meeting with [Department C]	Department C Leader	○ ○ ○
Shadow with [Department A]	Department A Leader	○ ○ ○

Legend: Completed In Progress Not Completed

Field Shadow with [Field/Service] tech	Appropriate Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Shadow with [Department B]	Department B Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
New Hire to present learnings to leadership team	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Manager	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 2

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
CRM Training	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Shadow with [Department C]	Department C Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Visit Current Customers with Ops - Service and Billing overview	Operations Manager / Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Industry Training (Competitive Landscape)	CEO	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Field Ride with senior salesperson	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Product Pricing Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training - Routine & Prospecting	Sales Manager	<input type="radio"/> <input type="radio"/> <input type="radio"/>
CRM Self-Learning	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Shadow Manager or Tenured Sales in field prospecting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Product Knowledge Training	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Contract Review and Training	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Field Prospecting - Minimum 50 Business Cards	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Interview happy customers - 3-5 report what makes them happy	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Study Phone Prospecting Skills	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed

Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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WEEK 3

TASK	RESOURCE	STATUS
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Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Phone Skills Training and Role Playing	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Industry Training (Competitive Landscape) Review	CEO	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Study Sales Process - Rapport & Discovery	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Product Knowledge Training	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Product Pricing Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Sales Process Training - Rapport & Discovery	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Full Day Prospecting 50+ business cards 75+ dials	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Study Sales Process - Presenting, Closing & Handling Objections	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Full Day Prospecting 50+ business cards 75+ dials	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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WEEK 4

TASK	RESOURCE	STATUS
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Attend Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Sales Process Training - Presentation, Closing & Handling Objections	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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2 Half Day Phone Sessions, Sales Manager shadow	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
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Legend: Completed In Progress Not Completed

First Sales Presentations 2-4 scheduled, manager to shadow meetings	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Product Knowledge Certification	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training - Entire Process	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 5

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review CRM and add all customers / prospects	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Regular Sales Routine in effect	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
4-6 New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2-3 Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 4+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 6

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review CRM and add all customers / prospects	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed

6-8 New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
3-4 Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 5+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 7

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
8-10 New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
5-6 Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 6+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
First Account Sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 8

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
10-12 New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed

7+ Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 7+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
1 New account sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 9

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
12-14 New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
8+ Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 8+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 New Accounts Sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 10

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
15+ New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed

8+ Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 8+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 New Accounts Sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 11

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
15+ New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
8+ Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 8+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 New Accounts Sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Review Onboarding Plan Progress	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

WEEK 12

TASK	RESOURCE	STATUS
Attend Weekly Sales Meeting	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Process Training Session - Review	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
15+ New Presentation achieved	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed

8+ Quotes delivered	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 Half Day Phone Sessions - 8+ appointments booked per session	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
2 New Accounts Sold	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Sales Certification Process	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Update sales opportunities in CRM	New Hire	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Debrief with Manager	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>
Final Onboarding Plan Review & Recommendations	Sales Leader	<input type="radio"/> <input type="radio"/> <input type="radio"/>

Legend: Completed In Progress Not Completed