

Sales Onboarding Checklist

PRE-BOARDING

- Send a welcome package
- Pre-start communication

FIRST DAY ESSENTIALS

- Prepare workstation
- Conduct orientation session
- Complete administrative tasks

PRODUCT AND SERVICE TRAINING

- Schedule product/service training sessions
- Arrange shadowing with experienced salespeople

SALES PROCESS AND TOOLS

- Provide a sales process overview
- Train on CRM and other sales tools

COMPANY POLICIES AND PROCEDURES

- Review code of conduct and ethical guidelines
- Go over sales-specific policies

GOALS AND EXPECTATIONS

- Set clear performance metrics and targets
- Discuss professional development paths

MENTORING AND SUPPORT

- Assign a mentor from the sales team
- Schedule regular check-ins with managers and mentors

Boost your sales with noCRM

- ✔ Streamline & optimize your sales process
- ✔ Enhance team collaboration & management
- ✔ Drive effective lead management & close more deals

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