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