

Onboarding

Defining what is important

We have prepared a template for a 12 month onboarding plan, where we have selected some standard areas for sales reps in a complex technology sales context. Use this as inspiration and create your own plan. Consider what is truly important and what differentiates sales reps in your company and context.

Some areas you may want to include are:

- Market and ecosystem understanding
- Contact network
- Customer understanding
- Product and Technology
- Personal traits
- Values & Cultural fit
- Sales technique
- Sales process and strategy
- Tools & Methods

A structured approach to competence management is helpful throughout all phases, from recruiting to the periodical evaluations. What you do the initial evaluation, already in the recruiting phase, and construct a initial training program to cover any weakness you discovered, we call it our Onboarding Program.

Onboarding program for a Salesperson

Below you find a template to use to create your own onboarding program. Fill the boxes with the training, meetings, and activities that your new hire should be planned to do within different time horizons.

Many of the activities such as “getting to know the company”, or walk through of practical tools and arrangements need to happen early on, and others will be more evenly spread out over the year. We suggest you stage the learning in

- Immediate
- 1st month
- 3 months
- 6 months
- 12 months

In each area you may also want to add success criteria, or milestones that you can check off and celebrate with your hire as he/she makes each one.



Onboarding program - Template

Competence areas	Activities and Timeline – completed within				
	Initial 2 weeks	1 st month	3 months	6 months	12 months
Company knowledge E.g <ul style="list-style-type: none"> • Who is who? • Get to know relevant people • Culture and Values • Practicalities • Salary and conditions 					
Product & Technology E.g <ul style="list-style-type: none"> • Product features • Saas Technology • Delivery models • Demo practice 					
Market & Industry E.g <ul style="list-style-type: none"> • Industry structures and drivers • Customer journey understanding • Contact network • Roleplays with typical Stakeholder roles 					
Sales Skills & Methods E.g <ul style="list-style-type: none"> • Sales Techniques training • Joint Visits coaching • Customer feedback 					
Sales Process, Tools & Forecasting E.g <ul style="list-style-type: none"> • CRM • Process understanding • Forecasting and reporting 					
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