Sales Onboarding Checklist : Checklist

For sales reps, managers and onboarding leads. Adapt every item to your site, equipment and written procedures.

Checklist

- ■ Hazard covered: mishandled objections
- ■ Hazard covered: pitching before discovery
- ■ Hazard covered: discounting too early
- ■ Decision practiced: handle a price objection
- ■ Decision practiced: ask for a next step
- ■ Decision practiced: ask discovery questions
- ■ Decision practiced: open the conversation and set an agenda
- ■ Hands-on part done: ride-alongs with experienced reps
- ■ Hands-on part done: product training
- ■ Hands-on part done: CRM process of the company
- ■ Review question: were objections handled?
- ■ Review question: was discovery done first?
- ■ Review question: was talk time balanced?

Stays hands-on and in person

- • ride-alongs with experienced reps
- • product training
- • CRM process of the company

This checklist supports, and does not replace, required training, supervision or evaluation. It does not certify anyone.