



Template: Sales Onboarding Overview

Welcome again to the team! We're excited for you to get started! 🎉 This Card is meant to provide a big picture look at how you'll ramp up in your role here at GreatCo.

Goals of your onboarding

A month from the day you start, you are out and working independently (e.g. you can hop on a call on your own). We'll know you're ready when you pass these certifications:

1. **Demo:** you know how to demonstrate the end user experience (using paper; ordering more paper) based on a mock customer's answers to discovery questions
2. **Customer Stories:** You know 5 selected customer stories. You are able to riff them off as needed
3. **Pitching:** You can navigate the decks to tell our story and sell paper

You can think of these 3 certifications as milestones to hit during your first month. While you will still be building your understanding in the role, you are a comfortable ambassador of GreatCo.. We'll help you every step of the way.

How do I get there?

Primarily by building your understanding of your role, our product, our processes, and our team. Here's a high-level breakdown:

- Understanding the product
- Understanding how to talk about GreatCo.
- Understanding the competition
- Understanding the Personas



- Understanding how to demonstrate the product
- Understanding the types of questions we want to ask to qualify and identify if the prospect is a good fit
- Understanding of the ecosystem GreatCo. is in
- Understanding who you'll work with day-to-day (on different teams)

Here's the full process:

- [Template: Sales Onboarding: Week 1](#)
- [Template: Sales Onboarding: Week 2](#)
- [Template: Sales Onboarding: Week 3](#)
- [Template: Sales Onboarding: Week 4](#)

A great place to start is by meeting the right people: [Sales Onboarding: Who to Meet](#)

Understanding is built from studying and practice. You'll leverage oGuru and other resources to build your knowledge. You'll also learn from conversations with team members across departments. As your understanding grows, your manager and other team members will do mock calls and role plays to further build and certify what you know. At the end you'll graduate and learn by doing in the field :)

What are my resources?

- Chorus/Gong: good for observing calls to see how people conduct them
- Formal teaching (trainings by your manager and the sales team)
- Reviewing content in our Guru instance and on our site

The Importance of Feedback

Sales Onboarding is currently being revamped so please share any feedback you have with @jim, @dwight, and @michael! The best way to get to know GreatCo. is by going through the resources we offer here in Guru so lean into your onboarding and don't be afraid to refine and build out our onboarding resources as you find helpful.