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| Sales Training Template |

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**How to Use This Template**

Thanks for downloading HubSpot’s Sales Training Template!

This tool was built for you to outline necessary training steps and information for members of your sales team. Included are sections common in most sales training plans, as well as prompts for you to fill out your company’s tactics and information.

**Simply erase *the italicized instructions and examples* in each section and replace them with what makes sense for your business.**

Once complete, this plan can be used to help onboard BDRs, sales reps, field reps, territory account executives, sales associates, and everyone else involved in the hands-on sales process.

Keep in mind, this template is designed to be completely customized by your company. If you feel there are sections included that you would rather omit, or if you think a section is missing, you are encouraged to make those changes as you see fit for your business and new employees.

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| **Need help putting your sales plan into action?**  Align your sales team with  HubSpot’s Sales Hub software. | |  | |
|  | [**Get Started With Sales Hub**](https://www.hubspot.com/products/get-started?utm_source=offers&utm_campaign=ql-update_sales-training-template) | |  |
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**[Name] Onboarding Plan**

* **Department/Role/Region:** *Insert Region*
* **Manager/Reporting To:** *Insert Manager*
* **Department Head:** *Insert Department Head*
* **Coach/Mentor:** *Insert Coach/Mentor*

**Welcome!**

*Reinforce your excitement for this new hire to join your company. Remind the new hire that this is not a complete list of their role expectations, nor is it a contract or employee handbook. Instead, it is a collection of the fundamental tasks and resources to help the new hire ramp up, onboard, and succeed in their role long term.*

**Training**

*Provide the details for the new hire’s training, including:*

* *Timeline for training and schedules for specific sessions.*
* *Details on what each session/priority will entail.*
* *Expectations from training, such as a final project, presentation, or pitch.*

**Tech Set Up**

*Explain what technologies will be made available to the new hire to help in their role. If setup is required (i.e. connecting to the printer), provide instructions or name the individual/team who can provide instructions for setup.*

* *Computer information.*
* *Phone information.*
* *Monitor information.*
* *Printer information.*

**Software and Operating Systems**

*Identify and link to the software required for the role. Provide setup instructions or resources, if necessary.*

* [*CRM Software*](https://hubs.ly/H0g0sqn0)*.*
* *Sales Enablement Software.*
* *Customer Communication Software.*
* *Company Wiki.*
* *Video/Virtual Meeting Software.*

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| **Pro Tip:** | Remember to link out to any full documentation for a more thorough explanation of high-level concepts. |

**Internal Communications**

*Should this new hire be on any email aliases/distribution lists? Are there any channels for them to join on slack? Is there a calendar or place where they should record vacation and time off? Outline those here.*

Email Aliases to Join

* *Example 1.*
* *Example 2.*
* *Example 3.*

Slack Channels to Join

* *Example 1.*
* *Example 2.*
* *Example 3.*

Calendars to Add

* *Example 1.*
* *Example 2.*
* *Example 3.*

**Benefits**

*Most of this will be covered by HR during orientation, but if there is anything additional to be completed in the first 100 days, outline that here.*

**People to Meet**

*Who are the people this new hire should connect with soon after starting? Provide the person’s name, role, and talking points to help make the 1:1 productive for both parties.*

* ***Employee Name****. Employee role. Employee description.*
* ***Employee Name****. Employee role. Employee description.*
* ***Employee Name****. Employee role. Employee description.*
* ***Employee Name****. Employee role. Employee description.*
* ***Employee Name****. Employee role. Employee description.*

**100 Day High-Level Goals**

*At a high level, what do you want this new hire to be able to do by the end of their first 100 days?*

At the end of your first 100 days, you should be able to:

1. *Expectation #1.*
2. *Expectation #2.*
3. *Expectation #3.*
4. *Expectation #4.*

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| **Pro Tip:** | This section should be extremely high-level — each individual month’s goals will be highlighted more specifically in the next section. |

**Month 1: *Date* - *Date*.**

*Month #1 should be about getting started on the right foot. Goals in terms of driving revenue for the business should be small, if not saved for a later time. New hires should emerge from this month with knowledge of the product, pricing, competition, and existing collateral. If there is any quota in the first month, consider time and prior experience before setting it, and try to keep it reasonable.*

*Below, outline the* ***goal(s)*** *for month #1, what* ***deliverables*** *(if any) are expected, how success will be* ***measured****, and any* ***resources*** *that will help the new hire get their work done.*

**Goal**: *Insert goal #1.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Goal**: *Insert goal #2.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Month 2: *Date - Date.***

*Month #2’s focus should be on putting month #1’s learnings into action. Expectations should be reasonable, depending on the new hire’s level of experience. It’s also a chance to expand company/product knowledge through conversations with customers and partners.*

**Goal**: *Insert goal #1.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Goal**: *Insert goal #2.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Month 3: *Date - Date***

*The third month should see salespeople springing into action. Goals should start to get more aggressive, as the rep should be reasonably armed for success at this point.*

**Goal**: *Insert goal #1.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Goal**: *Insert goal #2.*

**Deliverable / Measurement of Success:** *Insert measurement of success.*

**Resources:** *Insert and link resources.*

**Feedback and Reviews**

*Outline your cadence for feedback and managerial reviews. Also, identify what should be prepared before these reviews, if anything. This would also be the section to explain how managerial 1:1s will take place.*

**Weekly 1:1s:** *Day of Week/Time.*

**30-Day Check-In:** *Date.*

**50-Day Check-In:** *Date.*

**100-Day Review:** *Date.*

**[Company Name] Sales Strategy and Methodology**

*Every company does sales at least a little differently than every other. Explain your process for quota setting, competition, go-to-market, and prospecting. If you have an existing sales plan, link it here.*

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| **Free Tool:** | If you don’t already have one, use [this free sales planning template](https://hubs.ly/H0gkSNY0) to outline and share your methodology. |

**Required/Suggested Reading**

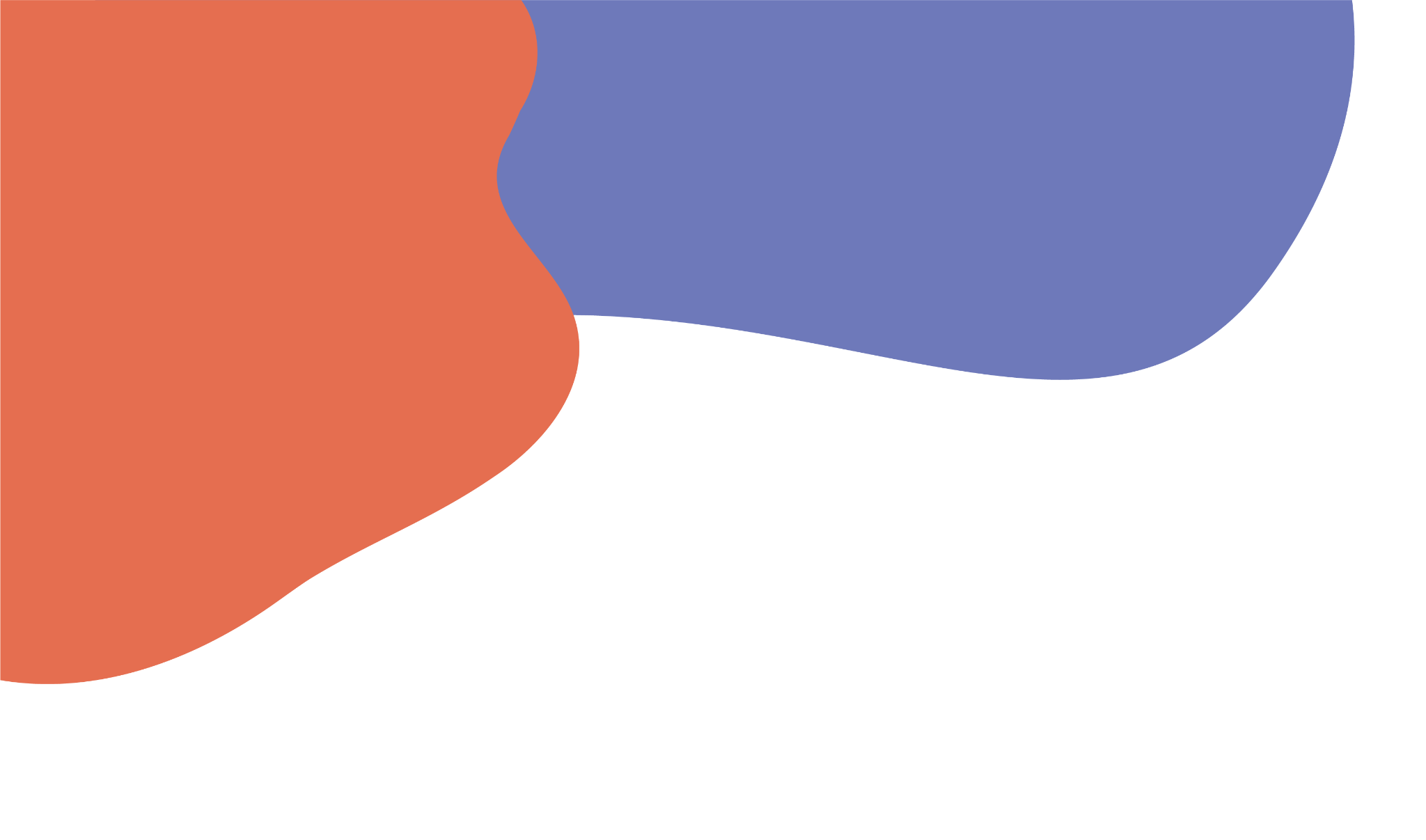
*If there is any documentation or any resources new hires should or must read, outline them here. These can be anything regarding company culture, role expectations, organizational leadership, or whatever is deemed mandatory. You could also style this as an FAQ section. Some resources might include:*

* *Article on team outings.*
* *Article on expensing.*
* *Article on time off policy.*
* *Article on our relationship with marketing.*
* *Article on sales in your area.*
* *Video introduction from our CEO.*
* *Company M-SPOT.*

**Resources for Your Success**

*Identify the people, places, and things that exist within the company. These can be mentors and leaders, after-work groups, sales hacks and tips, and more. Inclusions might be:*

* *A #sales-emergency Slack channel.*
* *Mentors and managers.*
* *Product managers.*
* *Sales training videos.*
* *Sales call recordings.*
* *Article on how to conduct a demo.*



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| Example  Template  Title |
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**Max Mayfield Onboarding Plan**

* **Department/Role/Region:** *Sales Manager – Hawkins, Indiana*
* **Manager/Reporting To:** *Jim Hopper*
* **Department Head:** *Martin Brenner*
* **Coach/Mentor:** *Steve Harrington*

**Welcome!**

Allow us to be the first to welcome you to Hawkins National Lab Equipment as a Sales Manager! We’re thrilled to have you here, and we hope you’re ready to turn the world of lab equipment sales in Indiana upside down.

This onboarding plan is a jumping-off point for your first 100 days at the company. Most of the information you’ll need to succeed will be outlined here, and if you need anything else, feel free to reach out to your manager, Jim.

This plan is not an exhaustive list of expectations for your role and may be adjusted over time. However, it outlines the fundamental tasks you’ll be expected to complete by the end of your onboarding period.

Let’s jump in.

**Training**

Training will last for three weeks, beginning on March 22nd. Each session has been added to your Google Calendar, which you can access here.

While your day-to-day will be different throughout the weeks, each week will have a core theme.

**Week 1:** *Company Fundamentals***.** You’ll learn about the history of our company, how things work around here, the needs of our customers, and where to register for your benefits.

**Week 2:** *Sales Process.* We’ll provide you with an overview of what’s in our product suite, how to sell our lab equipment, to whom you’ll be selling, and what resources you’ll have available to you to succeed.

**Week 3:** *Sales Presentation*. Your formal training comes to an end once you pass your mock sales presentation. During this week, you’ll workshop a pitch to your manager on how to sell our products.

**Tech Set Up**

You will work with our tech specialist Bob Newby to get your hardware set up. Your laptop and phone will be waiting for you on day one when you check in for training. You will also have the option of a monitor for your desk (which will be shipped to your home if you are a remote employee).

Finally, follow these instructions to get access to the company’s printer information. If you are a remote employee, connect with Bob to have a printer shipped to your home.

**Software and Operating Systems**

During training, you will be granted access to all of our sales tools and software, as well as all company software used for culture, HR, etc. If you have any issues logging in to access these tools, please reach out to Karen Wheeler in People Ops.

* **HubSpot.** We use [HubSpot](https://www.hubspot.com/products/sales) for our CRM and sales software. We utilize its features of call tracking and recording, document management, and email templates. HubSpot automates our process to help us sell more and smarter. You’ll be trained on HubSpot in your second week of onboarding, but can find more training videos on [HubSpot Academy](https://academy.hubspot.com/).

* **Enablement Pro:** We use Enablement Pro to upload and store our sales enablement collateral. Our marketing team creates case studies for us to repurpose, and our account managers update the sales comparison sheets for when you’re up against a competitor.

* **Atlassian**: We use Atlassian for all internal documentation. If you have questions about selling tips or how to add our company holiday calendar to your own, this is the place for you!
* **Zoom:** We use Zoom for all internal and external video conferences.
* **Slack**: We use Slack as our chat tool. *Please* make sure to add a photo of yourself and fill out your profile so your colleagues know who they are addressing!

**Internal Communications**

Below are some of the internal communication channels we suggest joining.

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| Email Aliases to Join | Slack Channels to Join | Calendars to Add |
| * Hawkins@HNLE.web * Sales@HNLE.web * Managers@HNLE.web | * #Sales-Questions * #Sales-Managers * #Sales-Memes (*This one’s our favorite!*) | * Sales Vacations * Company Holidays |

**People to Meet**

Make a point to schedule a 1:1 intro chat with the following individuals in your first or second month. As a best practice, please reach out to these individuals beforehand and ensure the time you selected works for them.

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| ***Mike Wheeler****: Territory Account Executive, Hawkins, Indiana.* | *Mike will be your partner in the Hawkins area. In the meeting, ask him about his closing tactics for the area and if he could connect you to his happiest clients to learn more from their success.* |
| ***Dustin Henderson:*** *Director of Sales, Indiana.* | While you won’t report directly to Dustin, he has an impressive lay of the land for the state. Ask him how he goes about goal-setting for his territory and what he most wants to see out of sales reps out in the field. |
| ***Joyce Byers:*** *HR Business Partner, Sales & Marketing.* | Joyce will be your liaison for any HR or business inquiries. Talk with her about how to best keep the line of communication open and what the best ways are to discuss any HR issues that may arise. |
| ***Billy Hargrove****: Product Manager.* | Ask Billy what’s on the horizon for the next six months and what features his team is most excited about. |
| ***Jane Ives:*** *Sales Engineer.* | Connect with Jane to learn more about the sales engineering connections you should be making in your first month or two. |

**100 Day High-Level Goals**

At the end of your first 100 days, you should be able to:

1. Hit your sales target each month with only occasional support from your colleagues.
2. Succinctly provide the value proposition for all products in our suite and know which of our buyer personas benefit from which products the most.
3. Navigate our sales tools like HubSpot with ease to ensure you’re using technology to help you get your job done.
4. Speak to the pros and cons we have compared to our direct competitors and be able to explain why we’re an overall better solution.

**Month 1: *March 22 – April 21***

Month 1 is about getting started on the right foot. You should emerge from this month with knowledge of the product, pricing, competition, and existing sales enablement collateral. If there is any quota in the first month, consider time and prior experience before setting it, and try to keep it reasonable.

**Goal #1**:Complete training.

**Deliverable / Measurement of Success:** The completion and successful delivery of your onboarding project presentation.

**Resources:**

* Project instructions.
* Competitor comparison sheets.
* Product one-pagers.
* List of common objections.
* Brand kit.

**Goal**:Contact 15 SQLs to set up appointments with a 60% success rate.

**Deliverable / Measurement of Success:** Demos booked with nine SQLs.

**Resources:**

* Competitor comparison sheets.
* Product one-pagers.
* List of common objections.
* Sales booking software instructions.

**Month 2: *April 22 - May 22***

Month 2’s focus is on putting month 1’s learnings into action. It’s also a chance to expand company/product knowledge through conversations with customers and partners.

**Goal**: Close ten deals.

**Deliverable / Measurement of Success:** Ten deals closed by the end of the month.

**Resources:**

* Competitor comparison sheets.
* Product one-pagers.
* List of common objections.
* Sales booking software instructions.

**Goal**:Host five customer calls to learn more about our buyers and how our products are used.

**Deliverable / Measurement of Success:** Five calls held with a detailed one-page write-up summarizing your learnings.

**Resources:**

* Buyer personas.
* Top customers list.
* Sales booking software instructions.

**Month 3: *May 23 - June 22***

At this point, you’re on your way to being fully ramped. Your goals will get more aggressive, as you should be reasonably armed for success at this point.

**Goal**:Close 15 deals.

**Deliverable / Measurement of Success:** Fifteen deals closed by the end of the month.

**Resources:**

* Competitor comparison sheets.
* Product one-pagers.
* List of common objections.
* Sales booking software instructions.

**Goal**:Book 30 demos.

**Deliverable / Measurement of Success:** 30 demos booked with SQLs.

**Resources:**

* Competitor comparison sheets.
* Product one-pagers.
* List of common objections.
* Sales booking software instructions.

**Feedback and Reviews**

We will have regular 1:1s to ensure HNLE is setting you up for success, alongside periodic check-is during your manager during your onboarding period to see that you are hitting your goals.

**Weekly 1:1s:** Tuesdays, 10:00-11:00.

**30-Day Check-In:** April 22nd.

**50-Day Check-In:** May 5th.

**100-Day Review:** July 1.

**HLE Sales Strategy and Methodology**

*Read our full sales methodology here.*

Our sales department has a signature way of closing deals that works for our region, industry, and buyer. When selling please keep these traits of our salespeople in mind:

* **Resourceful:** Reference our one-sheeter comparison sheets and product descriptors. These are proven talking points to help you win the sale and should be utilized.
* **Product experts:** The last thing we want you to do is only know the baseline information. We want you to know how these products work, have seen them in action, and know exactly when they’re applicable and for whom.
* **Authentic**: Never sacrifice honesty for the sale. We want you to be fully yourself in the sales process, and if someone is inquiring about a product that you don’t see as a good fit for them let them know! Your honesty can sway them to make the right decisions for a better product for them.

**Required/Suggested Reading**

To better perform your role and learn more about how to thrive at HNLE, please read the following articles:

* Team outings policy.
* Expensing policy.
* Time off policy.
* Sales & Marketing SLA
* Indiana territory overview.
* Video introduction from our CEO.
* Company M-SPOT.