



# ORIENTATION

## CHECKLIST

DAY 1

- Review Orientation Checklist
- Hiring Manager or onboarding buddy meet upon arrival (don't have them start during a major event where they will get lost)
- Update corporate email list so the new person is included
- Deliver & cover welcome packet
- Tour of the office
- Introduce 'mentor' or onboarding buddy and overview of the relationship
- Book 'ride alongs' with experienced team members



WEEK 1

- Introduce the new team member and give them the functions of their role
- Paperwork and Handout
- Intro to training- systems
- Set up workspace
- Meet with 'mentor' or onboarding buddy with new hire
- Set game plan for year 1
- Introduction to sales training



WEEK 2

- Company Strategy & Philosophy
- Ride alongs
- Intro to resources ( RAB, NAB, TVB, Trades)
- Continue sales training
- Introduction to sales pitch/ positioning
- Ideal prospects
- Set weekly projects for short-term wins
- Confirm understanding and engagement



WEEK 3

- Put together sample presentation
- Ride alongs
- Educate on accounts & compensation
- Continued training
- Assign both short and long-term projects





# ORIENTATION

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WEEK 4

- Start meeting with clients
- Continue training
- Go on calls with managers
- Review activity
- What's going on with them? Challenges?
- What do they need? What could have been done better?



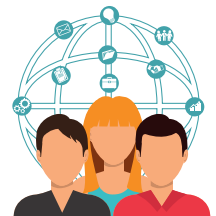
60 DAYS

- More independent field work
- How were the last 30 days?
- What did they like or dislike? Was the job described accurately?
- Areas of improvement
- Goal review



90 DAYS

- Are they contributing yet?
- Are they fully comfortable with the team, sell, processes, etc?
- Biggest AHA moment
- Needed improvement for success
- Confirm growth, engagement
- Observations about the company and training
- Goal review



YEAR 1

- Align goals and measurement objectives
- Establish growth plan and needed skills/ improvements

