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Crafted Sales Ramp Plan

The following is a guideline for a 6-month ramp plan for quota-carrying sellers. The first 4 weeks include a layered role play that aligns to a natural discovery process, beginning with an inbound lead to a solution-mapping presentation. This ramp plan should be modified to incorporate any Sales Boot Camps or client-built onboarding programs.

	2 - 3 Weeks Prior to Hire				
	General	**Product**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Offer Letter & Compensation approved ☐ Assign a "Buddy" to New Hire ☐ Determine Territory & Accounts ☐ Determine Quota with Sales Ops ☐ Ensure HR completes the below: ○ Reviews benefits ○ Extends verbal offer & send offer letter ○ Sends New Hire Paperwork ○ Schedules Orientation				
	2 - 3 Weeks Prior Milestones			**2 - 3 Weeks Prior Competencies**	
	☐ New Hire Understands Offer Details ☐ Manager/Sales Ops Determines Quota and Territory Assignments ☐ HR Completes Administrative Activities				

	1 Week Prior to Hire				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Conduct Welcome Call ○ Confirm Start Date ○ Identify Who Will Meet & Greet Day 1 ○ Share Week 1 Schedule ○ Share Name of “Buddy” ☐ Announce New Hire to Team ☐ Determine Performance Goals & Metrics of Success ☐ Ensure New Hire Set Up: ○ Office (in-person or remote) ○ Computer (hardware & software) ○ Distribution Lists				
	1 Week Prior Milestones			**1 Week Prior Competencies**	
	☐ Manager Determines Performance Goals ☐ HR Completes New Hire Office Set Up ☐ Buddy is Assigned				

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	Week 1				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Day 1: Greet New Hire ☐ Introduce New Hire to Team ☐ Have Lunch (if in person) ☐ Review Personal & Team Goals ☐ Introduce New Hire to Buddy ☐ Review Org Chart & Company	☐ Review Company Solution, Products and Services ☐ Review Ideal Customer Profile & Buyer Personas	☐ Review Sales Methodology (value messaging, qualification, etc.) with New Hire	☐ Educate New Hire on Sales Process (CRM stages/fields, forecast categories, etc.)	☐ Confirm Systems Access
New Hire	☐ Attend Company Orientation ☐ Meet with New Hire Buddy ☐ Introduction to BDR/SDR ☐ Introduction to Pre-Sales Engineer and/or Technical Sales Resource	☐ Review Company Solution, Products and Services with Buddy and/or Manager ☐ Begin Perusing Company Website and Content ☐ Review Ideal Customer Profile & Buyer Personas	☐ Review Sales Methodology (value messaging, qualification, etc.) with Manager or Buddy	☐ Review Sales Process with Manager or Buddy	☐ Confirm Systems Access ☐ Begin Reviewing Sales Collateral
	Week 1 Milestones			**Week 1 Competencies**	
	☐ Obtains Office Access and/or System Credentials ☐ Understands Company Objectives ☐ Understands Measures of Success for the Role ☐ Understands Comp Plan ☐ Completes **Role Play 1** with Passing Score ☐ Completes all Required Trainings			☐ Ability to deliver an “elevator pitch” via Role Play Activity 1 ☐ Able to articulate overview of Sales Process	

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	Week 2				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Confirm On-Going Meetings with New Hire (e.g., Forecasting Calls) ☐ Assess Week 1 Milestones & Competencies ☐ Weekly Check-In with New Hire ○ Describe Your Management Style ○ Describe Role, Compensation Plan, Territory, & Accounts ○ Review "Meet & Greets" to Schedule (Key Contacts in Company)	☐ Answer Questions on Company Solution, Products and Services	☐ Discuss Additional Questions/Concepts around Sales Methodology		☐ Work with Sales Operations to Ensure All Accounts, Opportunities, and Leads are in New Hire's Name
New Hire	☐ Weekly Check-In with Manager ○ Review Role, Goals & Territory ○ Review On-Boarding Process & Schedule ○ Review Compensation Plan ○ Review Week 1 Activities ☐ Schedule On-Going 1:1s ☐ Schedule Meet & Greets per Manager List	☐ View Demo of Product ☐ Meet with Product Marketing to Understand Positioning ☐ Review: Competitive Landscape with Buddy, Peers, or Manager ☐ Review: Customer Stories	☐ Shadow Buddy or Peers on at Least Two (2) Sales Calls ☐ Review Discovery Best Practices with Buddy, Manager, and/or SDR ☐ Complete **Role Play Activity 2**	☐ Meet with Marketing to Understand Lead Generation Strategy & Process ☐ Meet with Sales Operations to Understand CRM, Forecasting and Opportunity Management	☐ Training on Sales Systems (see below table)
	Week 2 Milestones			**Week 2 Competencies**	
	☐ Completes **Role Play 2** with passing score ☐ Completes all Required Trainings ☐ Scheduled Meetings with Key Individuals to Support On-Boarding			☐ Able to conduct effective discovery in Role Play 2 ☐ Can Describe Ideal Customer Profile ☐ Understands Manager Objectives & Expectations	

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	Week 3				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Assign Quota ☐ Strategize Key Accounts/Opportunities ☐ Begin Introducing New Hire to Customers ☐ Weekly Check-In with New Hire		☐ Review method for deal inspection ☐ Test for New Hire's Understanding: ○ Industry & Market ○ Target Buyer Personas & Business Challenges ○ Value for these Buyers ○ Competitive Landscape		
New Hire	☐ Weekly Check-In with Manager ☐ Sign Compensation Plan ☐ Receive Quota Assignment ☐ Being Developing Territory Plan ☐ Review Existing Account/Opportunity Plans ☐ Participate in Weekly Meetings & Calls	☐ Meet with Pre-Sales to Understand Demo Strategy & Process ☐ Understand Where to Find Product Documentation	☐ Meet with Buddy, Peer, or Manager to Understand Presentation Best Practices ☐ Shadow at Least **Two (2)** Discovery Calls ☐ Talk through **Three (3)** Customer Stories with Buddy and/or Manager ☐ Complete **Role Play Activity 3**	☐ Meet with Sales Operations to Understand Quoting & Proposal Process	☐ Continue training on sales systems
	Week 3 Milestones			**Week 3 Competencies**	
	☐ Completes **Role Play 3** with passing score			☐ Can Recite 2 Customer Stories	

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	General	Solution	Sales Methodology	Sales Process	Tools & Resources
	Week 4				
Manager	☐ Weekly Check-In with New Hire ○ Review Progress Since Week 1		☐ Ensure New Hire is Prepared for Role Play 4	☐ Review Negotiation Strategies & Closing Process with New Hire	
New Hire	☐ Weekly Check-In with Manager	☐ Review recorded presentations and/or shadow an additional call to prepare for Role Play Activity 4	☐ Complete **Role Play Activity 4** ○	☐ Meet with Manager to Understand Negotiation Strategies & Closing Process ☐ Meet with Buddy or Manager to Understand RFP and Proposal Process	
	Week 4 Milestones			**Week 4 Competencies**	
	☐ Completes **Role Play 4** with passing score ☐ Develops Initial Account/Opportunity Strategy for Assigned Territories			☐ Able to effectively present solution to prospect per Role Play 4	

	Weeks 5-8				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Weekly Check-In's with New Hire ☐ Role Play Initial Sales Calls with New Hire ☐ Review New Hire's Progress with Buddy o Understand Strengths & Weaknesses o Create Plan for Continued Development		☐ Test for New Hire's Understanding of: o Qualification Methodology o Solution & Service Offerings o Customer's Environment o Key Terminology, Acronyms, Systems, etc.		
New Hire	☐ Weekly Check-In's with Manager ☐ Review Month 2 Activities & Progress with Manager ☐ Attend/Participate in at least **two (2)** Customer Events ☐ Continue to Role Play Sales Calls with Peers, Buddy, and/or Manager ☐ Conduct Live Sales Calls with Peers, Buddy, and/or Manager ☐ Finalize Territory Plan	☐ Shadow at least **two (2)** Client-Facing Meetings ☐ Shadow the development & presentation of at least **two (2)** Solution Demos	☐ Create & Review an Opportunity Plan with Buddy & then Manager ☐ Schedule & Execute Meetings with Buyers for Your Top **five (5)** Targets	☐ Shadow the development of **two (2)** RFP Responses and/or Proposals	
	Month 2 Milestones			**Month 2 Competencies**	
	☐ Created & Vetted Territory Plan			☐ Can Articulate Value for Target Buyers ☐ Ability to qualify opportunities throughout the Sales Process using Sales Qualification Methodology	

	Weeks 9-12				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Weekly Check-In's with New Hire ○ Review 3 Month Activities & Progress ○ Review New Qualified Opportunities ○ Solicit Feedback on Onboarding Experience ○ Review Account & Territory Plans ☐ Review New Hire's Progress with Buddy ○ Identify Resources to Help Strengthen Areas of Weakness				
New Hire	☐ Role Play Difficult Sales Calls with Peers & Manager ☐ Solicit Feedback from Peers/Team ☐ Ensure you are Building Toward **3X** Qualified Pipeline	☐ Run a Technical Customer Meeting/Demo with Pre-Sales/Solution Consultant	☐ Identify Top Referenceable Customer in your Territory	☐ Create an Account Plan for your Top **three (3)** Accounts	
	Month 3 Milestones			**Month 3 Competencies**	
	☐ Completed 3 Month Sales & Product Training Courses in Command Center ☐ Identified & Connected with Key Territory Partners ☐ Built **3X** Net New Qualified Pipeline Since Start Date ☐ Achieving **$X** per week in Qualified Pipeline			☐ Able to conduct Business & Technical Sales Conversations without Support ☐ Effectively leveraging CRM to manage opportunities ☐ Executing Against Territory Plan	

	Weeks 13-24				
	General	**Solution**	**Sales Methodology**	**Sales Process**	**Tools & Resources**
Manager	☐ Weekly Check-In's with New Hire ○ Review 6-Month Activities & Progress ○ Review Top Opportunities ○ Review Pipeline				
New Hire	☐ Review 6-Month Activities & Progress with Manager ☐ Identify an additional **five (5)** Net New Qualified Opportunities > **$50,000** ☐ Role Play Solution Proposal Sales Calls with Peers & Manager ☐ Continue to Build Toward **3X** Qualified Pipeline ☐ Ensure you are on Track to Deliver **X%+** Assigned Annual Quota	☐ Continue Building Knowledge of Solution ☐ Attend Product Roadmap Sessions			
	Month 3 Milestones			**Month 3 Competencies**	
	☐ Closed at least **one (1)** Deal ☐ Created an additional **<u>five (5)</u>** Net New Qualified Opportunities ☐ Created **<u>$1M</u>** in Qualified Pipeline			☐ Capable of effectively peer-to-peer coaching future new hires ☐ Effectively manages & navigates the entire Sales Process to achieve quota	

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Tools & Processes for Successful Sales Rep On-Boarding

	Access Granted	Training Complete	Additional Notes
Systems & Tools to Leverage			
CRM (Hubspot, Salesforce)	☐	☐	
Conversational Intelligence (Gong, Chorus)	☐	☐	
Prospecting (Outreach, Salesloft, ZoomInfo)	☐	☐	
Content Management (Brainshark, Highspot, Seismic)	☐	☐	
Learning Management System (Cornerstone, Canvas)	☐	☐	
LinkedIn Sales Navigator	☐	☐	
Territory Plan	☐	☐	
Account Plan	☐	☐	
Opportunity Plan	☐	☐	
Digital Customer First Transformation System	☐	☐	
Sales Pitch Deck/Starter Deck	☐	☐	
Competitive Battlecards	☐	☐	
Customer Stories	☐	☐	
Product Overviews	☐	☐	
RFP Checklist/Template	☐	☐	

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Role Plays

Role Play 1	Goal	Instructions for Scenario	New Hire Activity	Competencies to Measure
	☐ Ensure New Hire can articulate an "elevator pitch" to a prospect	☐ Create a scenario that establishes contact with a warm mock lead. This could be an inbound chat, a conference lead, etc. Give the New Hire a high-level idea of what problem the prospect is interested in solving. ○ *Example: You've received an inbound chat from a prospect who is interested in solving for {{problem}}.*	☐ Send a follow up email or video to the lead with a short explanation of **{{your company}}** to see if they're interested in learning more.	☐ Articulates solution ☐ Customizes message to buyer/audience ☐ Is approachable and conversational in tone ☐ Asks for time and/or interest
Role Play 2	☐ Ensure New Hire can conduct effective Discovery	☐ Create a scenario in which the New Hire secures a meeting with the mock prospect ☐ Sales Enablement should complete Page 1 of the **Onboarding Role Play Preparation Sheet** for the role play. Provide the sheet to Manager, Buddy, or Role Player prior to the mock call. ☐ Provide a blank Page 2 of the **Onboarding Role Play Preparation Sheet** to the New Hire. ☐ Be sure the Role Player reveals certain elements of sales qualification methodology that the New Hire can leverage in Role Play 3. ○ *Example: Respond to the New Hire's Role Play 1 outreach and request a meeting.*	☐ Complete as much as you can of page 2 of the **Onboarding Role Play Prep Sheet** ☐ Conduct an initial Discovery call with mock prospect (no PowerPoint or demo allowed, questions only) ☐ Use page 3 of the **Onboarding Role Play Preparation Sheet** to take notes during your call	☐ Open-ended Discovery Questions ☐ Listens more than speaks ☐ Sends follow-up email restating the call
Role Play 3	☐ Ensure New Hire grasps sales qualification concepts	☐ Create a mock Deal Inspection with Manager or Buddy ○ *Example: Schedule a mock Deal Inspection with the New Hire to understand more about the prospect*	☐ Use **template** to conduct mock Deal Inspection with Manager ☐ Complete the remaining sections of page 2 of the **Onboarding Role Play Preparation Sheet**	☐ Demonstrates self-awareness by identifying gaps in understanding of deal ☐ Open to feedback from Manager/Buddy ☐ Proactively identifies & owns Next Steps with customer
Role Play 4	☐ Ensure New Hire can conduct effective solution presentation	☐ Create a scenario in which the New Hire is presenting **{{company}}** solution to at least two (2) individuals of varying levels at the prospect organization. ○ *Example: Respond to the New Hire's email summary with a request for another call.*	☐ Conduct a solution overview presentation, explaining your product/services to the prospect	☐ Utilizes company sales collateral effectively ☐ Explains how the challenges we solve directly impact functional or personal goals ☐ Ties offerings to the customer's explicit needs ☐ Navigates competitive positioning effectively ☐ Leverages Customer Stories to prove value in market ☐ Gains agreement on Next Steps