



30/60/90 Day Sales Plan

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This template will help sales managers ramp up new team members for success over a 3 month period.

1-30 DAYS: LEARN

- Do you understand the company's goals and mission?

Summary:

Next Steps:

- Do you understand the unique selling proposition?

Summary:

Next Steps:

- Do you understand the company's ideal customer profile (ICP)?

Summary:

Next Steps:

- Have you familiarized yourself with customer stories and case studies?

Summary:

Next Steps:

- Do you understand the customer onboarding process and lifecycle?

Summary:

Next Steps:

- Do you have a grasp on competitors in the space and industry trends?

Summary:

Next Steps:

- Have you met the colleagues who you'll be working with?

Summary:

Next Steps:

- Do you know what software is at your disposal and how to use each tool?

Summary:

Next Steps:

Do you have the recurring internal meetings you need set-up in your calendar?

Summary:

Next Steps:

31-60 DAYS: EXECUTE

Are you familiar with the stages of the selling cycle?

Summary:

Next Steps:

Have you shadowed 5 peers on calls?

Summary:

Next Steps:

Have you completed your product and/or demo training?

Summary:

Next Steps:

Have you practiced your customer interactions with colleagues?

Summary:

Next Steps:

Have you started developing relationships with key accounts?

Summary:

Next Steps:

Have you developed a list of prospects for outreach? Have you started reaching out to them?

Summary:

Next Steps:

Have you reviewed your territory?

Summary:

Next Steps:

Have you created a territory plan?

Summary:

Next Steps:

Have you set your OKRs? Do they ladder up to the larger company goals?

Summary:

Next Steps:

61-90 DAYS: ITERATE

Do you know what you need to do to be successful?

Summary:

Next Steps:

What have you learned from your peers? Have you adopted any new strategies from those around you?

Summary:

Next Steps:

Is your territory plan up to date? Do you have a clear path to target?

Summary:

Next Steps:

Have you sought out and received constructive feedback on your work?

Summary:

Next Steps:

What are some areas where you need improvement?

Summary:

Next Steps:

What tests have you run to improve your process?

Summary:

Next Steps:

Have you made time to reflect on what's working well?

Summary:

Next Steps:
