

# The New Salesperson Checklist

*Getting Your New Salesperson  
Started Off on the Right Foot*



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BRIAN JEFFREY

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That new salesperson you just hired is about to show up on your doorstep. The more welcome he feels and the sooner he gets into the corporate swing of things, the sooner he'll become productive. This checklist will pave the way for your new hire to come up to speed even more quickly.

A handwritten signature in black ink that reads 'Brian J.' with a stylized flourish at the end.

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*Published by:*  
Quintarra Consulting Inc  
1451 Donald B Munro Dr  
Carp, ON K0A 1L0 Canada  
613-839-7355  
Quintarra.com.

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by Brian Jeffrey

## First Impressions Count

You've heard the saying, "You only have one opportunity to make a first impression." While it may be a cliché, it's true. With every new encounter, we evaluate the other person and form an opinion of that person. Likewise, the new salesperson joining your company also forms a first impression of you and your company. It's important that this first impression is a positive one.



You only have one opportunity to make a first impression.

You don't want your new salesperson to show up at his new place of employment, all bright-eyed and bushy-tailed, only to be treated as an unexpected visitor and an interruption. Your new salesperson has taken a huge leap from a place where he was very comfortable into a new, and hopefully, wonderful company. He undoubtedly has great hopes and expectations of the new job. If these hopes and expectations aren't met, the new salesperson may be inclined to go back to where he came from (if possible) or continue to look for a better company to work for.

Use this checklist to help get your new salesperson started off on the right foot while creating a very professional first impression.



## The Checklist

The checklist is divided into five sections:

1. Before the Person Arrives
2. Day One
3. Company Policies and Procedures
4. Product Knowledge
5. Training

The framework for this checklist has been taken from Brian Jeffrey's ebook, *Breaking in the New Salesperson*, where you'll find more detailed information and further explanations.

Some of these sections, or parts of the sections, may apply to your operation while other key factors may have been left off. Use this checklist to build one that is appropriate to your organization.

### 1. Before the Person Arrives

- a) The work area has been assigned and equipped with the following:
  - An agenda for the first few days of employment
  - Set of business cards
  - Set of sales literature
  - Telephone and office supplies
  - Computer
  - Cell phone
  - Company vehicle (if provided)
  - Employee handbook



b) Workstation/computer

- Install required software
- Set-up and configure email account with log-in username and password
- Set server/system access permissions

c) Miscellaneous

- Inform the new salesperson when he should arrive
- Have someone assigned to meet the new salesperson
- Let the new salesperson know who to ask for when they arrive
- Inform other sales team members of the new salesperson

## 2. Day One

- Give the new salesperson a tour of the facility
- Show where work area is
- Identify the washrooms, office supplies, coffee area, lunchroom, etc
- Introduce key personnel
- Review the agenda for the first day, week, or month of employment
- Provide a copy of the job description
- Complete appropriate paperwork



### 3. Company Policies and Procedures

Provide a quick overview and explanation of the following:

- Company benefits
- Remuneration plan/commission structure
- Travel and entertainment expenses
- Automobile expenses
- Use of company credit cards
- Product return policies
- Product/service warranties
- Internal contract
- Paperwork flow
- Order processing
- Sales quotas
- Sales reports
- Company credit terms

### 4. Product Knowledge

- Schedule product knowledge training

Provide the following basics:

- Product profitability
- Product history
- Product future
- Price lists
- Product benefits
- Availability
- Reliability
- Competition



## 5. Sales Training

Ensure that your new salesperson is knowledgeable of the following:

- Who your typical customers are
- Effective prospecting techniques
- What his sales territory is
- Company-specific selling techniques

Finally:

- Arrange for joint sales calls

## Final Thought

Breaking in a new salesperson is like breaking in a new car engine. The more care you take, the longer it will last and the fewer problems it will give you. Make sure to “break in” your new salesperson properly so you get a good return on your investment of time and money.



## About Brian Jeffrey



Brian Jeffrey (a.k.a. *The Sales Wizard*) has spent over four decades in sales as a salesperson, sales manager, consultant, sales trainer, professional speaker, and writer. He's the author of over 100 articles on sales and sales management.

Brian is co-founder and president of Quintarra Consulting Inc and helps companies maximize their sales.