

Sales Manager Onboarding Template

Month 1: Leadership Foundation

Week	Leadership Focus	Team Management	Sales Operations
1	Leadership assessment, coaching training	Meet each team member individually	Review team performance metrics
2	Performance management, goal setting	Shadow current manager meetings	Learn forecasting process
3	Coaching methodology, feedback techniques	Conduct first coaching sessions	Analyze pipeline health
4	Team dynamics, motivation strategies	Lead team meeting	Create improvement plan

Month 2: Advanced Management Skills

Skill Area	Training Activities	Practice Opportunities	Competency Check
Pipeline Management	Forecasting training, deal review process	Weekly pipeline reviews	Accurate monthly forecast
Performance Coaching	Coaching frameworks, improvement planning	Individual coaching sessions	Team performance improvement
Recruitment	Interview training, candidate assessment	Participate in hiring process	Successfully hire quality candidate
Strategic Planning	Market planning, goal setting	Create team strategy	Present plan to leadership

Month 3: Full Management Responsibility

Responsibility	Daily Tasks	Weekly Tasks	Monthly Tasks
Team Performance	Review activity metrics, and provide feedback	One-on-ones, team meetings	Performance reviews, goal setting
Pipeline Health	Monitor deal progress, identify risks	Forecast updates, deal reviews	Market planning, quota allocation
Team Development	Coaching conversations, skill building	Training sessions, best practice sharing	Career planning, succession planning
Business Results	Track against targets, course correct	Report to leadership, strategy adjustment	Business reviews, planning cycles
