

Sales Onboarding Process: Technology Setup

Checklist

☐ **Core Systems Setup (Priority 1: Day 1)**

- ☐ **Email configuration:** Set up Outlook/Gmail with company signature and calendar sync.
- ☐ **CRM access:** Create user accounts with appropriate role permissions and data access.
- ☐ **Phone system:** Configure desk phone, mobile app, and voicemail setup.
- ☐ **Communication tools:** Install and configure Slack, Teams, or company chat platforms.
- ☐ **Calendar integration:** Sync calendar across all devices and platforms.

☐ **Sales-Specific Tools (Priority 2: Week 1)**

- ☐ **Email sequencing:** Set up Outreach, SalesLoft, or similar tool.
- ☐ **Demo software:** Configure screen recording and presentation tools.
- ☐ **Proposal tools:** Access PandaDoc, DocuSign, or proposal generation platform.
- ☐ **Social selling:** Optimize LinkedIn profile and connect social selling tools.
- ☐ **Analytics tools:** Set up access to call recording and conversation intelligence.
- ☐ **Lead intelligence:** Configure ZoomInfo, Apollo, or prospecting database access.

☐ CRM Configuration & Training

- ☐ **Personal dashboard:** Set up a personal dashboard with relevant metrics and pipeline views.
- ☐ **Opportunity stages:** Configure opportunity stages to match the company sales process.
- ☐ **Activity logging:** Set up activity logging and automated task creation.
- ☐ **Custom fields:** Create custom fields for tracking specific deal characteristics.
- ☐ **Email integration:** Set up email integration for automatic activity capture.
- ☐ **Reporting setup:** Configure reporting for personal performance tracking.

☐ Integration Testing & Workflows

- ☐ **Email to CRM:** Test email to CRM integration for automatic activity logging.
- ☐ **Calendar sync:** Verify calendar sync between CRM and email platform.
- ☐ **Proposal integration:** Test proposal software integration with CRM for deal tracking.
- ☐ **Call recording:** Confirm call recording integration and playback functionality.
- ☐ **Mobile access:** Verify mobile app access and offline capability.
- ☐ **Data management:** Test data import/export functionality for lead lists.

☐ **Security & Compliance Setup**

- ☐ **Two-factor authentication:** Enable two-factor authentication on all business accounts.
- ☐ **Security training:** Complete security training and acknowledge compliance policies.
- ☐ **Backup systems:** Set up backup systems for important files and contacts.
- ☐ **Software updates:** Configure automatic software updates and security patches.
- ☐ **Privacy compliance:** Verify GDPR/privacy compliance for customer data handling.

☐ **Training Environment Setup**

- ☐ **CRM sandbox:** Create a sandbox CRM environment with sample data for practice.
- ☐ **Demo accounts:** Set up demo accounts for hands-on product exploration.
- ☐ **Test workflows:** Configure test email sequences and automation workflows.
- ☐ **Learning access:** Provide access to video training library and learning management system.
- ☐ **Practice environments:** Set up practice environments for proposal creation and e-signature.
- ☐ **Testing space:** Create a safe testing space for new feature experimentation.

☐ **Mobile Setup & Accessibility**

- ☐ **Mobile apps:** Install all required mobile apps and configure notifications.
- ☐ **Mobile CRM:** Set up mobile CRM access with offline capability.
- ☐ **Mobile email:** Configure mobile email with push notifications for important contacts.
- ☐ **Video calling:** Test video calling and screen sharing from the mobile device.
- ☐ **Productivity apps:** Set up expense tracking and time management mobile apps.
- ☐ **File access:** Verify access to company files and documents from the mobile device.

☐ **Support Resources**

- ☐ **Support contacts:** Create a contact list for IT support and platform administrators.
 - ☐ **Credential storage:** Document login credentials in a secure location.
 - ☐ **User guides:** Provide user guides and quick reference cards for each platform.
 - ☐ **Help desk access:** Set up help desk ticket system access for technical issues.
 - ☐ **Follow-up check:** Schedule a follow-up tech check after the first week of usage.
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