SALES GEEK LEADERSHIP & MANAGEMENT PROGRAMME

COMPANION PLAYBOOK — EPISODE 17

The Onboarding Gap

A ninety-day plan for getting new sales hires productive

FOR	USE	TIME TO COMPLETE
Sales leaders and owners	**Any new sales hire**	**Two hours to build**

WHAT THIS PLAYBOOK IS FOR

Most new salespeople take far longer to become productive than they need to, and the reason is almost never the person. It is that onboarding has no deadline attached to it, so it gets squeezed by everything that does. This playbook gives you a way to run the first ninety days that is built on proof rather than activity. Work through it before your next hire starts, or use Part Four to find out what your current team was never taught.

HOW TO USE IT

- Part One defines what onboarding actually covers. Read it first — it changes what goes in the plan.
- Part Two is the ninety-day plan itself, as a template to fill in.
- Part Three is the leader's time commitment, which is the part that usually kills these plans.
- Part Four is for existing team members who were never onboarded properly.
- You do not need to have heard the podcast episode to use any of it.

PART ONE

What you are actually onboarding them in

Before you write a plan, settle what it has to cover. Four areas. They run in parallel from week one, and none of them is finished until it has been proved.

FRAMEWORK

The Four Competences

Nobody goes in front of a customer alone until all four have a tick

COMPETENCE	WHAT IT MEANS	PROOF THEY HAVE IT
Company	What we sell and don't sell. What we win on, what we lose on. Pricing logic and where the floor sits.	They can name three reasons a customer would choose a competitor, and what we say to each.

COMPETENCE	WHAT IT MEANS	PROOF THEY HAVE IT
Customer	Who buys. What pressure they are under. How money gets approved. What a bad year looks like for them.	They can describe a day in the buyer's life without mentioning our product.
Conversation	Our questions, in order, and the reasoning behind them. The four objections we hear every week.	A full discovery role-play you would be willing to let run with a real prospect.
Cadence	How this business works. CRM discipline, stage definitions, what "committed" means, review rhythm.	Their first ten CRM records are clean enough to forecast from.

Two warnings. Company is the easiest to teach and gets the most time, because it is the part already written down. Customer is the hardest and gets the least, and it is the one that decides whether they can hold a room. Weight your plan accordingly.

Where to start on Customer

Put the new starter in front of four existing customers inside the first fortnight. Not to sell and not to observe a sales call — to ask questions. Give them these five and tell them to take notes and nothing else:

- What was going on in your business when you first started looking at this?
- Who else had to agree before it could go ahead?
- What nearly stopped it?
- What would have happened if you had done nothing?
- What do you wish you had known before you signed?

A new seller who has heard four real answers to those questions is further ahead than one who has memorised the entire product catalogue.

PART TWO

The ninety-day proof point plan

The failure mode in most thirty-sixty-ninety plans is that every line is an activity. Activities tell you somebody was busy. Proof points tell you they can do the job. Every milestone below is something demonstrated, in front of a named person, who signs it off. If a proof point is missed, they do not move on — you teach it again.

TEMPLATE

The Proof Point Plan

Fill in the right-hand column. Do not move the gates.

BY	THEY CAN	PROOF	DATE / SIGNED
Day 10	Explain what we do and who for, in their own words, in ninety seconds.	Delivered live to two colleagues.	
Day 20	Describe the buyer's world — pressures, budget cycle, decision path.	One-page buyer profile plus notes from two customer conversations.	
Day 30	Run a discovery call end to end.	Recorded role-play, scored against the discovery standard.	
Day 45	Handle the four most common objections without a script.	Live role-play with the leader being deliberately difficult.	
Day 60	Own live opportunities and keep the CRM clean.	Pipeline reviewed in the normal weekly meeting, no special treatment.	
Day 90	Work unsupervised and forecast honestly.	Calls a deal correctly, or flags the slip before being asked.	

Setting your own proof points

The six above are a starting point and most businesses need to adapt them. When you write your own, test each one against three questions. Can somebody watch it happen? Could two different managers agree on whether it was met? Would you be comfortable letting this person loose if they passed it? If any answer is no, the proof point is too vague.

Day 90 is a two-way conversation

Book ninety minutes. Half of it is your assessment against the plan. The other half is theirs — what they were given, what was missing, what they had to work out alone. That second half is where you find the holes in the plan before the next hire falls into them.

PART THREE

The leader's time — and how to protect it

This is the part that kills most onboarding plans. Not the design. The diary. Onboarding has no external deadline, so it loses to everything that does. The only defence is to book the time before the person starts and treat it like a customer meeting.

COMMITMENT

What it costs you

Roughly three hours a week for twelve weeks

WHEN	WHAT	HOW LONG
Daily, weeks 1–2	Fifteen minutes at the end of the day. What did you learn, what confused you.	15 min
Twice weekly, weeks 1–4	Watch them do the job live — a call, a meeting, a role-play. Then feed back.	45 min each
Weekly, weeks 1–12	Structured one-to-one against the plan. Not a catch-up.	45 min
At each gate	Sign-off session. They demonstrate, you assess, you record it.	30–60 min
Day 90	Full two-way review.	90 min

Three rules that protect the time

- Put every session in the diary before day one, with the new starter's name in the title. Sessions that get booked weekly get cancelled weekly.
- If you have to move one, move it — do not cancel it. The distinction matters more than it sounds.
- Tell the new starter the plan on day one and give them a copy. Somebody who knows a session was promised will chase you for it, and that is exactly what you want.

Thirty-six hours over twelve weeks. Set that against a salary, a territory, and the six months you would otherwise spend not knowing whether the hire worked.

PART FOUR

Onboarding debt — for people who are already here

You cannot re-onboard a whole team. You can work out what they were never taught, because it shows up as a pattern. Run the diagnostic below across each member of your team and be honest about which row you recognise.

DIAGNOSTIC

The Onboarding Debt Diagnostic

The symptom you see now, the gap that caused it, and how to repay it

WHAT YOU SEE NOW	THE GAP	HOW YOU REPAY IT
Discounts early, before the customer has pushed.	Pricing logic and the floor were never taught, so they guess and protect themselves.	One session on how and why we price. Then role-play the price conversation until it holds.
Deals sit in one stage and nobody can say what happens next.	Cadence never set. The CRM became a place to record, not a place to think.	Rebuild their pipeline with them, deal by deal, agreeing the next commitment on each.
Well liked, poor qualifier. Nothing closes.	Taught the product, never the buyer. So they talk about us instead of them.	Three customer conversations, questions only, no deck. Then debrief what they heard.
Forecast optimistic and consistently wrong.	Stage definitions were never made explicit, so they are using their last employer's.	Agree what each stage means here in writing. Make them justify one call a week.
Avoids the phone. Busy with everything else.	Put on live calls too early with no structure, had a bad month, learned the phone hurts.	Back to the call structure. Sit with them for five calls. Rebuild the habit.

Before you start a performance process

Run this diagnostic first. A great deal of what gets labelled underperformance in month nine is a teaching gap from month one, and the conversation you need to have is completely different depending on which it is. Sometimes it genuinely is the person, and then you deal with that properly. But if you skip the diagnostic you risk exiting somebody, hiring again, and producing the same result twelve months later.

CLOSE

Your next seven days

Pick the ones that apply. If you have a hire starting soon, the first four are the priority. If you do not, start with the diagnostic.

- [ ] Write down the four competences as they apply to your business, with a proof point against each.
- [ ] Fill in the ninety-day plan template for your next hire, or for the last person who joined.
- [ ] Book the onboarding sessions in your diary now, before anyone starts.
- [ ] Identify four customers who would take a thirty-minute call from a new starter.
- [ ] Run the debt diagnostic across your existing team and mark the row you recognise for each person.
- [ ] Pick the single biggest debt on the team and book the session that repays it.
- [ ] Ask your last hire what they wish they had been given in week one. Then fix that.

Onboarding installs the standard your team runs on. What holds it in place afterwards is the rhythm of how the team works week to week, and what happens when the standard slips. Those are covered in the two playbooks that follow this one.

This playbook accompanies Episode 17 of The Mastery Podcast with James Denny and extends the Sales Geek Leadership & Management Programme. It is designed to be used standalone — no podcast listening required — and may be shared with clients and prospects by Sales Geek franchisees.

Sales Geek — the world’s largest provider of part-time Sales Directors. | salesgeek.co.uk