

# 4-WEEKS SALES ONBOARDING SCHEDULE

Your week-by-week sales onboarding schedule broken down by the hour. Personalize it and share it with your new sales team.

# SATURDAY ORIENTATION SCHEDULE

## Morning

- **9:30 –10:00**  
Arrival, Coffee & Light Breakfast Provided (Deck 01)
- **10:00–11:00**  
The Smart Host Story & Vision (Led by Evan: Deck 01)
  - Our Story, The Vision, The Next Year, Q&A
- **11:00–11:30**  
Our Product (Led by Dave: Deck 02)
  - Demo, Interacting with Engineering, Product Roadmap, Q&A
- **11:30–12:00**  
The Vacation Rental Industry (Led by Nick: Deck 03)
  - Our Customers, The Players, The Partners, Q&A

## Afternoon

- **12:00–1:00**  
Team Lunch
- **1:00–1:30**  
The Next Four Weeks (Led by Nick: Deck 04)
- **1:30–2:30**  
Tools of the Trade (Led by Nick: Deck 05)
  - The Office & Equipment; Email, Google Apps; Zenefits, Documents; Asana; Slack; Close.io
- **2:30–3:30**  
Preparing For Week One (Led by Nick: Deck 06)
  - Navigating Close.io; Phone Script; Email Blasts; Individual & Team Goals
- **3:30–4:00**  
Our Organization (Led by Evan: Deck 07)
  - Week by Week; Roles; Metrics; Values
- **4:00–5:30**  
Team Happy Hour (Location TBA)

# WEEK ONE SCHEDULE

Monday	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:00</b> Session: Cold Call + Scheduling Demo Intro</li> <li>• <b>11:00–1:00</b> Selling</li> <li>• <b>1:00–2:00</b> Session: Mock Calls</li> <li>• <b>2:00–5:30</b> Selling</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–10:30</b> Session: Close.io (CRM Training)</li> <li>• <b>10:30–1:00</b> Selling</li> <li>• <b>1:00–2:00</b> Session: Mock Calls</li> <li>• <b>2:00–4:30</b> Selling</li> <li>• <b>4:30–5:00</b> Sales Team Standup</li> <li>• <b>5:00–5:30</b> Zenefits Onboarding (HR Onboarding)</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:30</b> Company Weekly Sprint Meeting</li> <li>• <b>11:30–1:00</b> Selling</li> <li>• <b>1:00–2:00</b> Session: Cold Emails</li> <li>• <b>2:00–5:30</b> Selling</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:30</b> Weekly Sprint Meeting</li> <li>• <b>1:00–2:30</b> Session: Call Review</li> <li>• <b>2:30–3:30</b> Session: The Entire Team Does Cold Calls</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–2:30</b> Selling</li> <li>• <b>2:30–4:00</b> Session: Time Capsule<sup>1</sup></li> <li>• <b>4:00–4:30</b> Sales Team Standup</li> </ul>

# WEEK TWO SCHEDULE

Monday	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–5:30</b> Selling</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:00</b> Session: Objection Management</li> <li>• <b>11:00–4:30</b> Selling</li> <li>• <b>4:30–5:30</b> Sales Team Sprint Sync Up<sup>2</sup></li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:00</b> Company Weekly Review</li> <li>• <b>11:00–4:00</b> Selling</li> <li>• <b>4:00–5:00</b> One Minute Life Story<sup>3</sup></li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–5:30</b> Selling</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–2:00</b> Selling</li> <li>• <b>2:00–3:00</b> Call Review</li> <li>• <b>3:00–3:30</b> Sales Team Standup</li> <li>• <b>3:30</b> Leave early for Memorial Day weekend</li> </ul>

# WEEK THREE SCHEDULE

Monday	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> <li>• Memorial Day. Enjoy the holiday!</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:00–9:30</b> Arrival</li> <li>• <b>9:30–10:30</b> Smart Host Breakfast w/ a Data Scientist</li> <li>• <b>10:30–4:30</b> Selling</li> <li>• <b>4:30–5:30</b> Sales Team Sprint Sync Up</li> <li>• <b>6:30–8:00</b> Family Dinner + Circle<sup>4</sup></li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:00</b> Company Weekly Review</li> <li>• <b>11:00–4:00</b> Selling</li> <li>• <b>4:00–5:00</b> Call Review</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–11:00</b> Session: Hotel &amp; Airline Pricing (Led by Evan/Dave)<sup>5</sup></li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–4:00</b> Selling</li> <li>• <b>4:00–4:30</b> Sales Team Standup</li> </ul>

# WEEK FOUR SCHEDULE

Monday	Tuesday	Wednesday	Thursday	Friday
<ul style="list-style-type: none"> <li>• <b>9:30–4:00</b> Selling</li> <li>• <b>4:00–5:30</b> Call Review</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–4:00</b> Selling</li> <li>• <b>4:00–6:30</b> Sales Team Weekly + Monthly Review</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:00–9:30</b> Arrival</li> <li>• <b>9:30–10:30</b> Entire Team Weekly Review</li> <li>• <b>10:30–1:00</b> Entire Team Monthly Review</li> <li>• <b>1:00–5:30</b> Selling</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> <li>• <b>7:00–10:00</b> StartupBus NYC 2015 Kickoff Party               <ul style="list-style-type: none"> <li>○ Optional but fun. #Networking</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–1:00</b> Selling</li> <li>• <b>1:00–2:00</b> Session: Engineering (Led by Dave)</li> <li>• <b>2:00–3:30</b> Selling</li> <li>• <b>3:30–4:30</b> Call Review</li> <li>• <b>5:30–6:00</b> Sales Team Standup</li> </ul>	<ul style="list-style-type: none"> <li>• <b>9:30–10:00</b> Arrival</li> <li>• <b>10:00–4:00</b> Selling</li> <li>• <b>4:00–4:30</b> Sales Team Standup</li> </ul>

# NOTES

**<sup>1</sup>Time Capsule:** A 90-minute entire team exercise designed to explore how people's vision for the company's growth over the next year. Each person gets one notecard, and takes 15 minutes to answer the following questions:

- Where do you see yourself a year from today?
- What mark do you want to leave on the company?
- What new skill do you want to learn this year?
- Where do you see the company a year from now?
- Where should we go for the next company retreat? Why?

Everyone then shares their answers together. The leader takes the notecards and delivers them to everyone exactly one year later. Just like a time capsule!

**<sup>2</sup>Sales Team Sprint Sync Up:** This is a one hour recap for the week. Similar to any other "all hands" with the sales team. You go through each person's goals, pipeline, and set goals for the upcoming week.

**<sup>3</sup>One Minute Life Story:** A 1-hour exercise designed to help the sales team take a very complex and context-heavy story and condense into a clear 1 minute story. There's nothing more complex than someone's life story. Everyone takes 10 minute to craft a "one minute pitch" of their life story. They should try to make it sound like they've lived the most epic life without lying. Everyone provides feedback.

## NOTES

**4Family Dinner + Circle:** This is a weekly ritual we have at Smart Host. The entire team eats dinner together, and then we each share what's happening in our personal lives. We offer help to each other with any challenges people are having, as well as celebrate milestones.

**5** We did a session about a certain aspect of our industry. We believe in having our sales team be educators. You should spend time helping your sales team understand where to look and what to read within your industry to become an expert.

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