



**SALES
PLAYBOOK
BUILDER**

**SaaS
FOUNDER**

60-DAY SALES ONBOARDING SCHEDULE

**FREE TEMPLATE FOR
SAAS FOUNDERS**

Step 1: Select the applicable sales onboarding elements

Step 2: Add relevant onboarding elements to the next tab

ONBOARDING ELEMENTS

Administrative

- Sign In To Email and Other SaaS Tools
- Confirm General Company Onboarding
- Complete Paperwork
- Meet With Team Members
- 1 on 1 With Founder

Sales

- Read Sales Playbook
- Make Notes & Action Plan From Sales Playbook
- Ideal Customer Profile Deep Dive
- Meet With Existing Sales Reps
- Meet With Existing Customers
- 1 Day Shadow Existing Sales Reps
- 1 Day Shadow Founder During Dedicated Sales Block
- Practice Full Sales Cycle With Example Account
- Join Sales Meeting
- Shadow Customer Service

Demos

- Watch Demo Recordings
- Shadow Demos (Sit In On Call)
- Practice Demo With Founder / Existing Rep
- Live Demos With Rep/Founder On Call

60 DAY SAAS SALES ONBOARDING EXAMPLE



**SALES
PLAYBOOK
BUILDER**

WK 1 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Sign In To Email and Other SaaS Tools	
	Confirm General Company Onboarding	
	Complete Paperwork	
	Meet With Team Members	
	Schedule Weekly 1 on 1 With Founder	
	Set Agenda For Weekly 1 on 1 With Founder	
	Read Sales Playbook	
	Make Notes & Action Plan From Sales Playbook	

WK 2 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Re-Read Sales Playbook	
	Note & Update Action Plan From Sales Playbook	
	Meet With Sales Team Members	
	Watch Demo Recordings	
	Ideal Customer Profile Deep Dive	

WK 3 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Meet With Existing Customers	
	Shadow Existing Sales Reps	
	Shadow Founder During Dedicated Sales Block	

WK 4 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Practice Full Sales Cycle With Example Account	
	Shadow Customer Service	
	Shadow Existing Sales Reps	
	Shadow Founder During Dedicated Sales Block	

WK 1 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Live Demos With Support (Record)	
	Shadow Demos	
	Live Demos With Support Review & Feedback	

WK 2 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Live Demos Solo (Record)	
	Shadow Demos	
	Live Solo Demos & Feedback	

WK 3 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Live Demos Solo (Record)	
	Shadow Demos	
	Live Solo Demos & Feedback	

WK 4 **ELEMENT** **TEAM MEMBER FOR REFERENCE**

	Live Demos Solo (Record)	
	Shadow Demos	
	Live Solo Demos & Feedback	

JOIN A FREE
WORKSHOP