



# First 90 Days

Toolbox For New Sales Leaders





# Chapter One: Before Day 1

## Onboard Yourself to Prepare

# Your Onboarding Objectives

1.

## **Team Composition and Structure:**

Know who you want to interview on day one and what questions you'll ask to ascertain the morale and capability of your sales team. Prepare to mitigate any risk of losing star performers and have a plan for diffusing awkwardness with those who may have posted for your position and lost.

2.

## **Impending High-Value Deals or Customer Risk:**

Determine immediate actions required to close business, make quota or mitigate customer or revenue retention risk for the quarter.

3.

## **Financial Performance:**

Understand the performance history for your team to get a sense of likely future performance compared to revenue expectations that might have already been set for you.

4.

## **Pipeline / Forecast for next 3 – 6 months:**

Start evaluating whether there is any need to improve the health of basic sales metrics, such as pipeline multiple, forecast, win rate and average days in sales.

# Onboarding Checklist – Hard Data

Request this information and analyze it before Day 1

Category	What you want to know:
<p><b>1. Team Composition and Structure:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Org chart (your team including direct reports)</li> <li><input type="radio"/> Your peer counterparts (division Sales VPs for example)</li> <li><input type="radio"/> Names of top performers and anyone passed over for your position</li> </ul>	<p>Who to set up interviews with starting day 1.</p>
<p><b>2. Impending High-Value Deals or Customer Risk:</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Top late-stage deal status</li> <li><input type="radio"/> Impending risk to forecast, deal closure, or revenue retention</li> <li><input type="radio"/> Strategic customers exhibiting signs of retention risk</li> </ul>	<p>What immediate action is needed to either win top opportunities or mitigate revenue or customer retention risk</p>
<p><b>3. Financial Performance (your team, division, business unit):</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> YTD Progress against goal</li> <li><input type="radio"/> Monthly/quarterly forecast against target</li> <li><input type="radio"/> 4 – 6 Quarter trend</li> </ul>	<p>Are you ahead, behind or on track to make immediate financial targets, what's the trend driving current performance.</p>
<p><b>4. Pipeline and/or Forecast (next 3 – 6 months):</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Pipeline report from CRM showing the sale funnel, if applicable</li> <li><input type="radio"/> Sales forecast for the next 90 days, if available</li> <li><input type="radio"/> Win rate, if available</li> <li><input type="radio"/> Revenue retention rate, if applicable</li> </ul>	<p>Basic health of the sales funnel and/or forecast. Initial impressions of volume, velocity and competitive risk.</p>
<p><b>Assumptions:</b> You've already researched company's strategy; market position; business/product lines; financial performance; executive officers; geographic structure; recent organizational / operations changes; major news items.</p>	

# The Six Sales Leader Transition Traps

Raise your awareness to avoid getting caught

- 1. Failing to secure your team**  
because you've made assumptions about morale, commitment and employee satisfaction
- 2. Misjudging seller capability**  
or making hiring/firing decisions based on assumptions about ideal seller capability
- 3. Committing to grow revenue by a certain percentage or specific deadline**  
without fully understanding the average sales cycle
- 4. Failing to understand how operational aspects of the business**  
impact your sales team or vice versa
- 5. Failing to build relationships you'll need to "plow the road"**  
when your team encounters internal hurdles
- 6. Over-estimating your team's capacity to absorb change**  
and sustain it





# Chapter Two: Days 1 - 30

Learn & Take Action for Early Wins

# Your First 30-Days Objectives

**1. Secure the Team:**

Blank area for objectives related to securing the team.

**2. Secure the Customers:**

Blank area for objectives related to securing customers.

**3. Get the Organization Right:**

Blank area for objectives related to getting the organization right.

**4. Get the Financials Right:**

Blank area for objectives related to getting the financials right.

**5. Get Out of the Way:**

Blank area for objectives related to getting out of the way.

# Early Win Candidates: Decision Table

## Early Win Candidate #1:

Aligned With Mgmt. Priorities? (Y/N)	Ease / Speed to Achieve (Scale of 1 - 5, 1 = Easy / Fast)	Benefits to Team or Company	Benefits to Customer	Benefits to Me	Aids Long-Term Strategy? (Y/N)

## Early Win Candidate #2:

Aligned With Mgmt. Priorities? (Y/N)	Ease & Speed of Achieving (Scale of 1 - 5, 1 = Easy / Fast)	Benefits to Team or Company	Benefits to Customer	Benefits to Me	Aids Long-Term Strategy? (Y/N)

## Early Win Candidate #3:

Aligned with Mgmt. Priorities? (Y/N)	Ease & Speed of Achieving (Scale of 1 - 5, 1 = Easy / Fast)	Benefits to Team or Company	Benefits to Customer	Benefits to Me	Aids Long-Term Strategy? (Y/N)

# Early Win Candidates: Learning & Action Plan

Win #1	Learning 1	Learning 2	Action 1	Action 2
	Due Date:	Due Date:	Due Date:	Due Date:
Win #2	Learning 1	Learning 2	Action 1	Action 2
	Due Date:	Due Date:	Due Date:	Due Date:
Win #3	Learning 1	Learning 2	Action 1	Action 2
	Due Date:	Due Date:	Due Date:	Due Date:



# Chapter Three: Days 31 - 60

**Dig Deeper to Set Longer-Term Strategy**

# Your Next 30-Days Objectives

- 1. Dig deep into your sale organization**  
so you can determine longer-term strategy
- 2. Actively look for instances of misalignment**  
between the different aspects of your sales organization, and note them for later remedy
- 3. Identify those influencers who will be needed**  
to ensure your team's future success and begin building relationships with them
- 4. Use your discovery efforts to political advantage**  
with peers and upper management and to establish credibility with your team
- 5. Re-clarify your management's priorities and expectations**  
to ensure they haven't changed in the last 30 days



# Strategy & Structure Questions

1

Describe our relationship with customers. Do they see us as strategic partners, and do they consult with us on their business issues to solve their problems? Or do they see us as one of their vendors who provide a product or service?

2

What's the biggest challenge facing the sales organization today? What is the cause? Is there anything preventing us from addressing it?

3

What's the biggest opportunity we have as a sales organization that we aren't exploiting today. What's it worth to us? What's preventing us from pursuing this opportunity?

4

When we win a deal, why do we win? What do customers say about why they selected us? What differentiates us from our competitors?

5

When we lose a deal, why do we lose? What do customers say about why they did not select us (give reasons other than price)?

6

If you were me, what would you focus on first?

# Process & Tools Questions

1

How standardized is our sales process? Is it custom to our group or is it standard across the company? Is this the right process for how our customers buy?

2

How disciplined are the sales team and front-line managers at executing the sales process consistently to win?

3

What is our CRM system? How disciplined are we at using it to manage the business.

4

What tools does the sales team have to help it win (account or territory plans, win plans, deal qualification checklists, sales collateral, presentations, etc.). What additional tools does the sale team need to be effective.

5

What supporting groups (*marketing, sales operations, pricing, insights group, pursuit management, product management, subject matter experts*) provide the most critical support. Why is their support important? How well do we collaborate with them and use what they provide? What additional support does the sales team need to be effective?

# Enablement & People Questions

**1** Are the responsibilities of every role in the sales organization clear and do the different roles know how to coordinate to win deals effectively and efficiently?

**2** Does the sales team have the right skills to win effectively against our competitors? What skills need to be improved or enhanced and why?

**3** How well do we articulate the business value of our offerings to our customers? How well do we use data and insights to show that value? What would improve our performance in this area?

**4** Who are the best sellers in the organization? What do they do differently from everyone else to make themselves successful?

**5** What additional support does the sales team need to do its job effectively? Is there anything they should STOP doing, START doing or CONTINUE doing better?

**6** Tell me about the best day you ever had in your position. Tell me about the worst.

# Metrics & Management Questions

**1** Do we have clear performance metrics (leading and lagging), and does the team know what they are and how their actions affect them?

**2** Does the sales team know how the sales organization is performing at any given time?

**3** Are we pursuing the right mix of new customer acquisition and current customer expansion to maximize revenue or strategic advantage?

**4** Do front-line managers have a consistent cadence with their team to ensure they're effectively managing their business?

**5** Do front-line managers have a consistent coaching cadence with their team to drive performance and personal development?



# Chapter Four: Days 61 - 90

## Align Your Sales Organization

# Your Last 30-Days Objectives

1

2

3

4

5