

NEW-HIRE READINESS TOOL

SALES REP ONBOARDING SCORECARD

THE QUESTION IS NOT: DID THEY FINISH TRAINING?

The question is: can this rep execute the sales process consistently without a manager rescuing the conversation?

THREE READINESS CHECKPOINTS

DAY 7 | FOUNDATION

Understands the offer, buyer, and process.

DAY 14 | CONTROLLED PRACTICE

Can demonstrate the critical behaviors in role-play.

DAY 30 | SUPERVISED EXECUTION

Can apply the process in real conversations.

Manager: _____ Rep: _____

SCORE THE BEHAVIORS

Use evidence from a role-play, call recording, or live observation. Score each item 0-3: 0 = not demonstrated; 1 = needs prompts; 2 = mostly independent; 3 = consistent and independent.

FOUNDATION

Buyer and offer

Explains target customer, problem, and value clearly.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Process knowledge**

Names the stages and purpose of each stage.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Preparation**

Uses CRM, notes, and approved materials correctly.

☐ 0 ☐ 1 ☐ 2 ☐ 3

CONVERSATION EXECUTION

Opening and control

Sets a clear purpose and earns permission to proceed.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Discovery**

Uncovers needs, context, impact, and decision factors.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Recommendation**

Connects the proposed solution to what was discovered.

☐ 0 ☐ 1 ☐ 2 ☐ 3

DECISION MANAGEMENT

Objections

Clarifies concerns before responding.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Next steps**

Secures a specific, mutual next action.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Follow-up**

Documents and executes a purposeful follow-up plan.

☐ 0 ☐ 1 ☐ 2 ☐ 3

OPERATING DISCIPLINE

CRM hygiene

Records accurate outcomes and next steps.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Coachability**

Applies feedback in the next practice or call.

☐ 0 ☐ 1 ☐ 2 ☐ 3**Independence**☐ 0 ☐ 1 ☐ 2 ☐ 3

TOTAL: _____ / 36

CHECK THE READINESS GATES >

READINESS IS MORE THAN A SCORE

Use these score ranges as internal coaching guidance, not validated industry benchmarks. Apply the readiness gates below before assigning independent calls.

0-17**NOT READY**

Continue guided practice and close foundational gaps.

18-27**DEVELOPING**

Allow supervised calls with targeted coaching.

28-36**PROVISIONAL READY**

Confirm critical behaviors before independent work.

NON-NEGOTIABLE READINESS GATES

Even with a high total, do not approve independent selling until the rep can demonstrate all four:

- ☐ Runs meaningful discovery before recommending.
- ☐ Explains value without defaulting to premature discounting.
- ☐ Confirms the buyer's decision process and next step.
- ☐ Records commitments and follows approved compliance rules.

7-DAY DEVELOPMENT COMMITMENT

Priority skill: _____

Practice / call review: _____

Owner + review date: _____

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