



# Hiring Toolkit

## Sales Representative



## Customizable, Ready-To-Use Resources

### Included in this toolkit:

- **An inclusive, skills-based job posting**
- **Sourcing channels to reach a more diverse set of candidates**
- **Resume screening guide**
- **Skills-based interview guide and evaluation rubric**
- **Interviewee selection tool**
- **Onboarding plan**

The Rework America Alliance has developed resources to help employers adopt more inclusive, skills-based talent management practices, helping employers to remove bias from the hiring process, better recognize the capabilities of candidates, increase diversity, and support their local communities.

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## About the Rework America Alliance

The **Rework America Alliance** is a nationwide partnership of civil rights groups, nonprofits, private sector employers, labor unions, educators, and others. Alliance partners are working together to get people without a college degree into better-paying jobs that provide opportunities for career growth. In particular, the Alliance is working to support Black and Latino workers who face some of the most challenging barriers to economic mobility.

## What are Inclusive, Skills-Based Practices?

Rather than relying on education, credentials, past experience, and other proxies for ability, a skills-based strategy recognizes that there are many ways to acquire knowledge and ability. Skills-based practices help employers identify and articulate the skills needed in a role and build processes for assessing and validating those skills.

Implementing inclusive skills-based hiring practices can help employers reduce bias and increase diversity, identify and articulate the skills needed in a role, fill skill gaps, support career development, reduce turnover rates, and open the door to more skilled employees from various backgrounds and industries.

Research has shown that hiring based on skills is 5x more predictive of future performance than hiring for education and 2.5x more predictive than hiring for work experience.

### What is Included in the Toolkit

This toolkit has customizable, ready-to-use resources to help you take a skills-based approach to sourcing and hiring talent.

- **Skills-Based Job Posting:** Customizable job postings highlighting role-specific skills with inclusive language. Designed to engage candidates and attract a diverse talent pool.
- **Resume Screening Guide:** A candidate selection rubric containing role-specific skills, focusing on the skills new hires need. Helps to remove bias in the screening process.
- **Interview Guide and Evaluation Rubric:** Questions specifically designed to assess skills, with a rubric for evaluating responses. Asking all candidates the same skills-based questions reduces bias and makes it easier to compare candidate responses.
- **Interviewee Selection Tool:** An interview question comparison guide enabling hiring teams to assess interviewee scores across skill areas. The tool focuses conversations on candidate skills and abilities.
- **Onboarding Plan:** A sample skills-based plan to get new hires up to speed.
- **Sourcing Channels:** Starter lists of job boards, career fairs, and other channels to diversify and improve candidate pools.

Learn more with the Rework America Alliance's [Skills-Based Sourcing & Hiring Playbook](#)

A step-by-step guide providing advice, case studies, resources, and tips from leading employers on how to implement key skills-based talent practices.

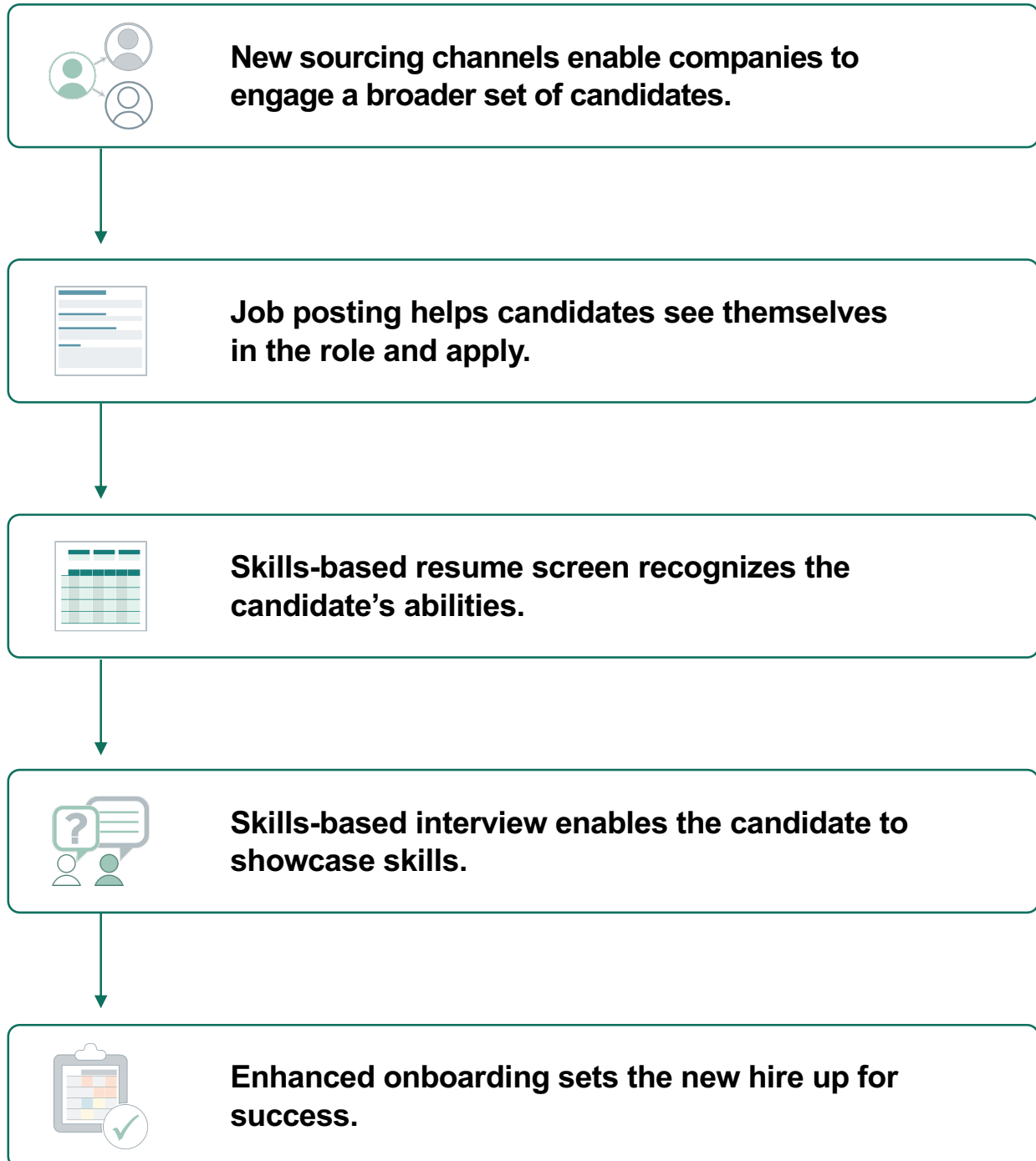
# A Skills-Based Approach in Action



## Focusing on Skills Helps Job Seekers and Employers

Where a pedigree-based approach tends to result in new hires with the same background and experiences as existing staff, a skills-based approach enables organizations to leverage a wider talent pool and build a more diverse and high-quality workforce.

This approach also enables workers to see how their experiences and skills could help them succeed



# Skill Comparison Guide



Limiting your requirements to what is truly needed increases your chances of finding a candidate with the skills needed to get the job done.

## Occupational vs. Foundational Skills

### Occupational Skills

Skills are **specific to an industry or job**. These skills are the Occupational skills a person needs to perform narrowly defined tasks and duties.

### Foundational Skills

Skills are **professional knowledge and skills that are transferable** from one job to another and across industries.

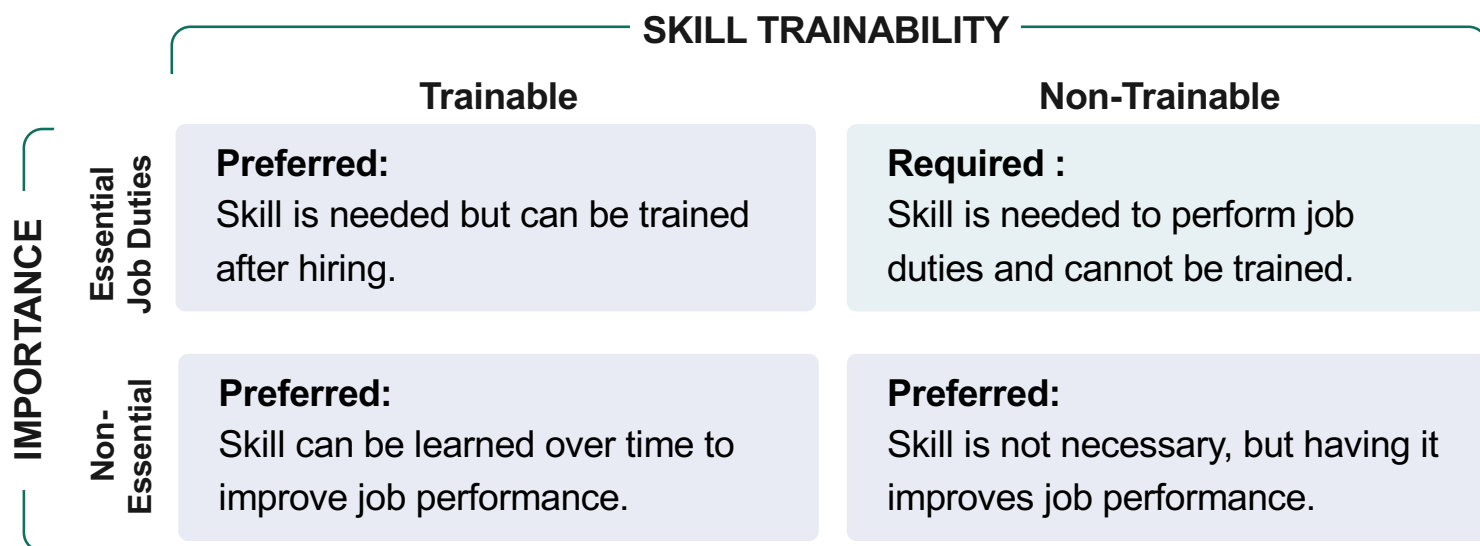
## Required vs. Preferred Skills

### Required Skills

Skills that are **necessary to perform essential job duties** at the specified level and there is no capacity to train; therefore, a candidate must have them on day one to complete job responsibilities.

### Preferred Skills

Skills can be **trained during onboarding** and/or are used to perform non-essential job duties.



## Expanding Sourcing Channels Enables You to Reach Untapped Pools of Talent

Traditional sourcing strategies focus on a narrow set of colleges, job boards, and peer companies. The result is a homogenous candidate pool, inflated recruiting budgets, and lower retention as companies compete over a small subset of the workforce. Expanding your sourcing channels enables you to reach untapped pools of talent, leading to better and more diverse hiring.

The information below provides a starter list of job boards, community organizations, and other tools to help reach and engage a more diverse candidate pool.

**The following are examples of organizations available for partnership to help you diversify your talent pipeline and tips and suggestions for working with them.**

### Job-readiness organizations

- [UnidosUS](#)
- [National Urban League](#)
- [Goodwill](#)
- [Rural LISC](#)

Screening and training provided for employability and job-specific skills

### Support existing apprenticeship and pre-apprenticeship programs

- [The U.S. Department of Labor – Apprenticeship Site](#) is a good source to help you develop and launch an apprentice program.

### Virtual career fairs and job boards designed for specific populations:

- **Applicants with disabilities:**  
[Recruit Disability](#), [Hire Autism](#), [Blind Institute of Technology](#)
- **Veteran applicants:**  
[Veteran Recruiting](#),
- **Applicants with criminal records:**  
[National Employment Law Project](#)
- **LGBTQ applicants:**  
[Out for Undergrad](#), [Pink Jobs](#), [Campus Pride](#), [Out & Equal](#)
- **Black and Hispanic applicants:**  
[Jopwell](#), [Diversity.com](#), [PDN Recruits](#), [iHispano](#), [Black Career Network](#), [Black Jobs](#), [Hispanic/Latino Professionals Association \(HLPAA\)](#)
- **Female applicants:**  
[Fairygodboss](#), [PowerToFly](#), [Career Contessa](#) (focus on millennials), [Female Executive Search](#) (focus on C-level candidates), [The Mom Project](#)
- **Immigrant and refugee applicants:**  
[Upwardly Global](#), [Amplio Recruiting](#)

# Job Posting Template



## Why Inclusive, Skills-Based Hiring Matters

### Struggling to attract a diverse, job-ready candidate pool?

Your job posting could be turning top candidates away.

An inclusive, skills-based job posting removes bias-prone credential requirements that dissuade potential candidates – especially those from more marginalized communities – from applying.

It replaces them with descriptions of the responsibilities of the role and the skills needed to succeed, enabling candidates to visualize how their background and abilities might translate to the job. It also provides additional detail on the role, workplace culture, and compensation.

For additional job posting support visit: [generator.skillful.com](https://generator.skillful.com)

The Skillful Job Posting Generator is a free online tool to help identify the skills and competencies required for a job and incorporates those skills into a simple job posting format.

### Want to learn more about how to write an inclusive, skills-based job description?

📍 Check out the Job Description section of our [Sourcing & Hiring Playbook](#).

#### Instructions for use:

- Add company-specific elements to the job posting, including a company overview and job details (e.g., salary, benefits, location).
- Review list of required and preferred skills and their definitions. Adjust as needed.
- Share final draft with a diverse set of employees to gather feedback and spot potential bias.
- Begin sourcing candidates. Add to your company website, distribute to partners, and post with a diverse set of sourcing channels.

# Job Posting Template

## Sales Representative



**This toolkit model is an example of how to structure a skills-based job posting. Everything included in this toolkit can be tailored to each company's own needs.**

### Company Overview

<Please insert a paragraph talking about your company and what makes it unique. Include details that capture the core values, culture, and mission of your company so job seekers understand the environment they will be working in.>

### Job Summary and Responsibilities

Sales representatives are responsible for communicating the benefits of a company's products to drive sales. Sales reps serve as the point of contact between a business and its prospects or clients and have a range of responsibilities, including identifying and educating prospective customers while supporting existing clients with information and assistance related to products and services.

Sales representatives are responsible for selling a company's products by identifying leads, educating prospects on products through calls, trainings, and presentations, and providing existing customers with exceptional support. Sales representatives are either inside or outside sales reps. Inside sales reps sell products over the phone and online, while outside sales reps sell products through face-to-face meetings. Sales reps span almost every industry.

<Add any additional responsibilities or changes relevant to this role at your company.>

### Example Activities

- Present, promote and sell products/services using solid arguments to existing and prospective customers
- Perform cost-benefit and needs analysis of existing/potential customers to meet their needs
- Establish, develop, and maintain positive business and customer relationships
- Reach out to customer leads through cold calling
- Expedite the resolution of customer problems and complaints to maximize satisfaction
- Achieve agreed upon sales targets and outcomes within schedule
- Coordinate sales effort with team members and other departments
- Analyze the territory/market's potential, track sales, and status reports
- Supply management with reports on customer needs, problems, interests, competitive activities, and potential for new products and services.



# Job Posting Template

## Sales Representative



### Required Skills

#### Required Occupational Skills

- **Sales Management Strategies and Software:** Knowledge of various sales tools and strategies to keep track of customer relationships, such as call intelligence, conversational marketing software, CRM and BRM tools/practices.
- **Office Management Tools (Computer Fundamentals):** Comprehend and use multiple end-user software packages and cloud solutions (which include business productivity suites such as Microsoft Office or Google Docs).
- **Communication/Persuasion:** Speaking to others in a verbal and written format to convince, agree to a commitment, purchase a product or service, or take a course of action.

#### Required Foundational Skills

- **Customer Service:** Effectively interact with clients to build meaningful relationships with clients, setting expectations, and tactfully discuss a buyer's pain points while pitching the product/service.
- **Problem Solving:** Collect and review information to develop, evaluate, and implement solutions that help a customer solve the issue at hand.
- **Active Listening:** Giving full attention to what other people are saying to fully understand their point of view; asking questions as appropriate and not interrupting at inappropriate times.

### Preferred Skills

#### Preferred Occupational Skills

- N/A

#### Preferred Foundational Skills

- **Organizational:** Responsible for account activity, sales documentation, reports, and regional management.
- **Time Management:** Oversee one's own time and tasks to ensure they make the most of the buyer's time and their own in an efficient manner.
- **Coordination:** Works with the office staff to ensure prompt and accurate billing and documentation of services.

# Job Posting Template

## Sales Representative



### Required Certifications *Note: Insert additional certifications but only if truly required.*

Certified Sales Development Representative (CSDR) - not shown in job postings but shown in research that complements the skills.

### Job Details

**Location:** \_\_\_\_\_

**Department:** \_\_\_\_\_

**Salary / Pay Range:** \_\_\_\_\_

**Benefits:** \_\_\_\_\_

**Full / Part-Time:** \_\_\_\_\_

**Travel Required:** \_\_\_\_\_

**Nights or Weekends:** \_\_\_\_\_

**Remote / In-Person:** \_\_\_\_\_

**Physical Work:** \_\_\_\_\_

**Additional Details:** \_\_\_\_\_

### Inclusivity Statement

<We are committed to creating a diverse and inclusive environment and are proud to be an equal-opportunity employer. All applicants will receive consideration for employment without regard to race, creed, color, national origin, religion, sex (including pregnancy, childbirth, or related medical conditions), gender, gender identity, age, marital status, physical or mental disability, predisposing genetic characteristics, sexual orientation, domestic violence victim status, military status, or veteran's status.>

# Resume Screening Guide

## Why Inclusive, Skills-Based Screening Matters

### Don't overlook the best candidates.


Traditional screening approaches are time-consuming and bias-prone.

Many of your top candidates, especially those from diverse backgrounds and those without a 4-year college degree, never make it to the interview stage.

Inclusive, skills-based screening focuses on whether candidates have the skills necessary to do the job regardless of where those skills were acquired.



### Want to learn more about taking a skills-based approach to screening candidates?

 Check out the Screening section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Ensure all required skills listed in your job posting are included in the left column of the guide.
- Share the resume screening guide with the team involved in resume reviews. To help protect against bias, where possible have multiple team members from different backgrounds and departments review resumes.
- Use the screening guide to inform which applicants advance to the next round of the hiring process. If using multiple reviewers, discuss any discrepancies between their evaluations.

## Sales Representative

### Instructions for use:

- Use a chart like the one below to track whether a resume contains evidence of required skills.
- Scan through each resume to determine whether the candidate demonstrates the skill, is missing the skill, or if it is unclear.
- Appropriately mark resumes against each skill, and use the chart to compare resumes and help select candidates to interview.
- Some skills are easier to identify in a resume than others. Focus on required skills that you can reasonably expect to identify in a resume.

Identify whether this skill is:	<b>Demonstrated</b>	<b>Missing</b>	<b>Might Have</b>
	Y (or) ✓	X	?

Required Skills To Evaluate:	Candidate / Resume #									
	1	2	3	4	5	6	7	8	9	10
Sales Management Strategies and Software										
Office Management Tools										
Communication/Persuasion										
Customer Service										
Problem Solving										
Active Listening										
Organizational										
Time Management										
Coordination										

*Preferred skills should not be evaluated at the resume screening stage.*

# Interview Guide & Evaluation Rubric




The interview process is one of the points in the recruiting process in which the greatest number of qualified, diverse candidates and candidates without a 4-year college degree are unintentionally screened out as interviewers select candidates most like themselves or those already in the organization.

This process prevents employers from hiring the best talent and adding diversity to the organization.

An inclusive, skills-based interview works to combat “like-me” bias by providing a structured, consistent approach that focuses on the skills new hires need to possess for the role and ensures all candidates are asked the same questions.

Scoring candidates on a consistent 1-5 scale for each skill further ensures interviews are focused on evaluating critical skills.

## Want to learn more about taking a skills-based approach to interviewing candidates?

 Check out the Interview & Selection section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Review the list of required and preferred skills in your job posting. Ensure there is at least one interview question to evaluate each skill.
- Review the list of questions and evaluation rubric in the template. Adjust as necessary.
- Share the interview guide with a diverse set of employees for feedback to help spot bias.
- Ensure all candidates are asked the same questions to reduce bias and make it easier for interviewers to compare candidates. Complete the evaluation rubric during, or immediately following, the interview.

# Interview Guide Template



## Sales Representative

### Instructions for use:

- Each question in this guide is designed to evaluate a specific required skill for the job.
- Take notes as needed for each question and record interview responses.
- Make sure to ask all candidates the same questions to make it easier to compare their abilities.
- Assign a numerical score for each question using the rubric as a guide.

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_ Total Score: \_\_\_\_\_

Required Skill: **Sales Management Strategies and Software**

**QUESTION: Imagine you are given a new sales opportunity. Walk me through your process of potentially getting them onboard and your process for tracking the relationship.**

Rating	Description of Rating
1	<b>Lowest</b> Failed to provide a response.
2	Situation failed to adequately address the scope of the question of analyzing data and documenting it.
3	Had thoughtful ideas that resulted of how the situation could be applied.
4	Provided clear steps in getting potential clients, did not mention the documentation of the relationship.
5	<b>Highest</b> Could provide a broad strategy that included communication techniques in addition to the process of documenting the relationship of a client at each step.

Required Skill: **OFFICE MANAGEMENT TOOLS (COMPUTER FUNDAMENTALS)**

**QUESTION: As technology rapidly changes and evolves, how do you keep your technology skills current?**

Rating	Description of Rating
1	<b>Lowest</b> Neglects to learn and utilize all new technology until mandated.
2	Learns passively.
3	Conducts personal reading and research on new technology primarily within the company.
4	Learns all new technology within the company and conducts research on new technology outside the company.
5	<b>Highest</b> Learns all new relevant technology and schedules demos with key stakeholders to get to know new products and services within the company and externally.

# Interview Guide Template



## Sales Representative

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **Communication / Persuasion**

**QUESTION: Tell us about a time when you had to appeal to a customer's needs. What approach did you take that ensured your success in resolving the issue?**

Rating	Description of Rating
1	<b>Lowest</b> The example given was irrelevant to the question.
2	Somewhat communicated with the customer; nothing came out of the conversation.
3	Communicated with customer but conversation seemed not to be engaging, nor did it resolve the issue.
4	Communicated and empathized with the customer but was unable to convince them to take action.
5	<b>Highest</b> In addition to understanding and sharing what the customer was going through, was able to meet customer's needs, convincing them to act in resolving the issue.

Required Skill: **Customer Service**

**QUESTION: Describe a time in which you built trust and established a relationship with a customer.**

Rating	Description of Rating
1	<b>Lowest</b> Did not describe a specific event.
2	Describe a situation when built trust but the behavior was not clearly articulated.
3	Demonstrated understanding of what it is to build trust and establish a relationship.
4	Described situation in which approach of building trust and establishing a relationship was made but did not lead to a positive result.
5	<b>Highest</b> Described a specific situation and detailed behavior(s) that led to building trust and establishing a relationship with a patient, leading to a positive result for the patient.

# Interview Guide Template



## Sales Representative

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Required Skill: **ACTIVE LISTENING**

**QUESTION:** Describe a time when your team didn't achieve the sales quota. What did you learn? What did you do to ensure you reached the next goals?

Rating	Description of Rating
1	<b>Lowest</b> Did not provide a relevant example.
2	Gave an example of not meeting a quota, but no further information.
3	Discussed reflection of failure and evaluation of what went wrong, but did not mention how they can/did better.
4	Reviewed and evaluated the process of what went wrong and how they can do better, but did not implement solution nor showed results.
5	<b>Highest</b> Demonstrated how they reviewed failure and implemented a new focus to solve the issue and reach the goal.

Required Skill: **Active Listening**

**QUESTION:** Explain a time when your listening skills helped you achieve a goal.

Rating	Description of Rating
1	<b>Lowest</b> Did not give an example of how listening was used to achieve a goal.
2	Gave an example of achieving a goal that did not relate to skill.
3	Generalized how an individual could use active listening to achieve a goal but did not give a specific example.
4	Demonstrated use of active listening but did not show follow-up and results.
5	<b>Highest</b> Demonstrated use of active listening to inform a decision that resulted in a positive outcome.



# Interview Guide Template



## Sales Representative

Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Preferred Skill: **Organizational**

**QUESTION: Describe a project that required a high amount of energy over an extended period. How did you balance this project amongst others?**

Rating	Description of Rating
1	<b>Lowest</b> Lack of knowledge and experience of being organized.
2	Described ways of being organized but did not give an example.
3	Described a project that required a lot of energy did not highlight much on how they were organized throughout the duration.
4	Provided an example with an insight of how they were organized for that project but did not manage other projects well that was ongoing at the same time.
5	<b>Highest</b> Provided an example and gave examples of tasks prioritized based on timely deadlines along with the project's needs and the needs of other projects.

Preferred Skill: **Time Management**

**QUESTION: Describe how you prioritize tasks to ensure you meet important deadlines?**

Rating	Description of Rating
1	<b>Lowest</b> Lack of knowledge and experience and got overwhelmed and “eventually” figured it out.
2	Conceptually understood the idea of prioritizing tasks, but due to lack of practice or success, the candidate still struggles in this area in terms of figuring out which tasks to complete first and then completing all said tasks.
3	Created a list of tasks in order based on a priority of the client's needs & management needs but was unable to focus on the timely-based functions and did not finish all tasks.
4	Created a list of tasks in order based on a priority of the client's needs, time-focused deadlines and management needs but was unable to finish all tasks.
5	<b>Highest</b> Provided critical steps on how they got their list of tasks prioritized based on timely deadlines and the client's needs and the needs of management and how they chose to complete the tasks in said order.

# Interview Guide Template

## Sales Representative



Candidate Name: \_\_\_\_\_ Candidate #: \_\_\_\_\_

Preferred Skill: **Coordination**

### QUESTION: How do you coordinate with multiple colleagues/team members?

Rating	Description of Rating
1	<b>Lowest</b> Did not demonstrate the ability to coordinate with others.
2	Described well thought out plan but did not involve others in the plan or within the actions.
3	Demonstrated ability to coordinate with others but did not result in a positive outcome.
4	Demonstrated working with others well but did not describe a well thought out plan.
5	<b>Highest</b> Demonstrated specific time and process individual took to coordinate with multiple stakeholders that resulted in a positive outcome.

# Assessment Template



## Sales Representative

### Instructions for use:

- During the final round interview, provide 30 minutes for candidates to complete the following assessment to evaluate skills required for the Sales Representative.
- This is an open-ended assessment and allows for evaluating skills that may be hard to assess by answers to interview questions.

### SUMMARY OF THE PROBLEM:

- Consider a role-playing exercise involving a hypothetical buyer seeking a product or service that has demands specific to your industry.
- Ask the candidate to explain how they would generate, develop, and close this sales opportunity.

### AS YOU CONSIDER THE ABOVE SITUATION, ANSWER THE FOLLOWING QUESTIONS:

1. Evaluate **ACTIVE LISTENING** and **CUSTOMER SERVICE** skill  
**Did the candidate understand the scope of the problem the customer is trying to solve?**
  
2. Evaluate **COMMUNICATION** skill  
**Did they describe how the product or service would meet the needs of the customer?**
  
3. Evaluate **PROBLEM-SOLVING** skill  
**Did they give an example of helping customers to solve a problem they have?**
  
4. Evaluate **SALES MANAGEMENT STRATEGIES** and **ORGANIZATIONAL** skill  
**What steps were taken to follow-up with the customer, whether they are or aren't interested in the product or service?**

# Interviewee Selection Tool



## The Decision

**After completing interviews and assessing each candidate's skills, how do you determine whom to hire?**

Selection conversations are often prone to bias as interviewers describe “gut-feelings” or a level of comfort with candidates who are most similar to themselves.

The comparison tool introduces some structure and objectivity to the process, enabling hiring teams to compare interviewee scores across skill areas.

The tool helps keep selection conversations focused on candidate skills and abilities.

**Want to learn more about taking a skills-based approach to interviewing candidates?**

 Check out the Interview & Selection section of our [Sourcing & Hiring Playbook](#).

### Instructions for use:

- Ensure the skills in the selection tool match the ones outlined in the job posting and interview guide.
- Add the minimum required score for each skill to the first column. This score should be determined in advance and should reflect the team's capacity to train a new hire in that skill area.
- For each applicant, enter the score(s) they received from each interviewer for each skill.
- Use the notes column to capture additional feedback from interviewers.
- Reference the scores to evaluate and compare candidates and inform selection.

# Interviewee Selection Tool



## Sales Representative

### Instructions for use:

- Use a chart like the one below as a guide to compare applicants during interview and selection process.
- Ensure the skills match the ones outlined in the job posting and interview guide.
- Add the minimum required score for each skill. This score should be determined in advance and should reflect the team's capacity to train a new hire in that skill area.
- For each candidate, enter the score(s) the candidate received for each skill listed from each interviewer
- Use the notes column to capture additional feedback from interviewers.
- Reference the scores to evaluate and compare candidates and inform selection.

Interviewer Name A: \_\_\_\_\_

Interviewer Name B: \_\_\_\_\_

Candidate Name #1: \_\_\_\_\_

Candidate Name #2: \_\_\_\_\_

Candidate Name #3: \_\_\_\_\_

Skills To Evaluate:	Minimum Score*	Candidate / Resume #					
		1		2		3	
		A	B	A	B	A	B
Sales Management Strategies and Software							
Office Management Tools							
Communication/Persuasion							
Customer Service							
Problem Solving							
Active Listening							
Organizational							
Time Management							
Coordination							
<b>Total Score</b>							

\*Minimum score required (determine prior to interviews)

# Onboarding Plan



## Skills-Based Strategies Enable Customization and Training

While traditional onboarding plans are often one-size-fits-all initiatives that focus on compliance and HR, a skills-based strategy enables much more customization and training.

An effective skills-based hiring strategy provides you with a lot of information on the abilities a new hire currently possesses and needs to learn to perform in their new role.

This information enables you to tailor their onboarding plan to get them up to speed in areas identified as potential gaps.

### Want to learn more about taking an inclusive, skills-based approach to onboarding candidates?

 Check out the Onboarding section of our [Sourcing & Hiring Playbook](#).

#### Instructions for use:

- Ensure that all required and preferred skills from your job posting are included in the onboarding plan. The goal should be to get all new hires up to a baseline level of skill as quickly as possible to ensure they can effectively contribute.
- Review the onboarding plan with hiring managers. Adjust activities as needed based on training resources available and staff capacity. Make sure to build in training opportunities (informal on-the-job and/or structured training) for each skill.
- Work with managers to customize the onboarding plan to each new hire, referencing their interview and assessment evaluation forms to identify areas of relative weakness.
- Spread out training and onboarding activities to avoid overwhelming new hires with too many activities in the first day or week. Align training with job responsibilities to improve retention.

# Example Onboarding Activities



## Sales Representative

Examples of skills-based onboarding activities for this role that align with the required and preferred skills included in the job posting. Activities should address areas of need identified during the hiring process and scheduled during the first 60 days of employment.

Required Occupational Skills	
Skill	Activity
Sales Management Strategies and Software	Meets team members to align on goals and how to succeed in the work.
Office Management Tools	Introduction to technical support, answer any questions.
Communication/Persuasion	Shadowing team and communicating live with customers, having peer/mentor as a guide.

Required Foundational Skills	
Skill	Activity
Customer Service	Employee is coached by experienced peers on how to communicate and make decisions when communicating with the customer.
Problem Solving	Review outcomes of team's performance and brainstorm activities to improve problem-solving skill.
Active Listening	Participant in scenarios with experienced peers to evaluate active listening that may come up with customers.

Preferred Occupational Skills	
Skill	Activity
N/A	N/A

Preferred Foundational Skills	
Skill	Activity
Organizational	Access to relevant learning materials.
Time Management	Assigned tasks regularly to the employee from the supervisor.
Coordination	Understanding and shadowing the ins and outs of the various roles that play into assisting one customer.

# Example Onboarding Table



## Sales Representative

	Day 1	Week 1	Week 2	30 Days	60 Days
Sales Management Strategies and Software					
Office Management Tools					
Communication/Persuasion					
Customer Service					
Problem Solving					
Active Listening					
Organizational					
Time Management					
Coordination					