

# Company Onboarding Checklist

Welcome to SalesExchange — let's get your opportunities in front of sales reps.

## Account Setup

- ⑥ Download the SalesExchange app (App Store or Google Play)
- ⑥ Create a Company account
- ⑥ Upload your company logo
- ⑥ Write a clear company description
- ⑥ Add your company website
- ⑥ Submit account for approval

## Prepare Your First Opportunity

Before posting, define the following:

- ⑥ What product or service will reps be selling?
- ⑥ What is your average deal size?
- ⑥ What commission % will you pay reps?
- ⑥ When will reps be paid? (e.g., 30 days after customer payment)
- ⑥ Who internally will manage rep communications?
- ⑥ Do you have sales materials or scripts ready for reps?

## Post Your First Opportunity

- ⑥ Tap Post Opportunity in the app
- ⑥ Add a clear, detailed opportunity title
- ⑥ Write a detailed description of what you are selling
- ⑥ Define the target customer profile
- ⑥ Set the commission % or structure
- ⑥ Set the estimated deal size range
- ⑥ Upload any available sales materials

- ⑥ Add contact instructions for reps
- ⑥ Publish the opportunity

## Managing Reps

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- ⑥ Monitor who claims your opportunity
- ⑥ Respond to reps within 24–48 hours
- ⑥ Approve qualified reps to work your opportunity
- ⑥ Communicate clearly with reps
- ⑥ Review submitted deals and deal stages
- ⑥ Update deal status promptly
- ⑥ Mark deals **Closed Won** when complete
- ⑥ Pay commissions on time

## Your First 30-Day Goals

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- ⑥ Post 1–2 opportunities
- ⑥ Approve at least 2 reps
- ⑥ Move at least 1 deal to Proposal stage
- ⑥ Close your first deal through SalesExchange

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Questions? Contact [support@insidesalesmanager.app](mailto:support@insidesalesmanager.app)