

Sales Rep Onboarding Checklist

Welcome to SalesExchange — let's get you earning commissions.

Account Setup

- ⑥ Download the SalesExchange app (App Store or Google Play)
- ⑥ Create your account
- ⑥ Upload a professional profile photo
- ⑥ Write a short bio highlighting your sales background
- ⑥ Add the industries you sell in
- ⑥ Add your contact information
- ⑥ Connect your LinkedIn profile (if available)
- ⑥ Submit account for approval

Profile Optimization

- ⑥ Confirm your profile photo looks professional
- ⑥ Write a compelling bio — mention specific products or services you've sold
- ⑥ List all industries you have experience in
- ⑥ List any certifications or sales credentials

Start Using the Platform

- ⑥ Browse available opportunities
- ⑥ Filter by industry and commission rate
- ⑥ Claim your first opportunity
- ⑥ Reach out to the company to introduce yourself
- ⑥ Create a deal from your claimed opportunity
- ⑥ Begin moving deals through pipeline stages
- ⑥ Review the **My Commissions** section so you understand how tracking works

Best Practices to Follow

- ⑥ Only claim opportunities you plan to actively work
- ⑥ Communicate with companies regularly — don't go silent
- ⑥ Update deal stages every time something changes
- ⑥ Release opportunities you are not working
- ⑥ Be professional in all platform interactions

Your First 30-Day Goals

- ⑥ Claim 3–5 opportunities
- ⑥ Create at least 2 deals
- ⑥ Move at least 1 deal to Proposal stage or higher
- ⑥ Close your first deal

Questions? Contact support@insidesalesmanager.app