

30-60-90 day plan | Sales manager onboarding

Insights from Recall.ai's Amanda Zhu COO guide on driving seven-figure enterprise deals

30 DAYS: FOUNDATION & IMMERSION

Weeks 1 & 2: Company Knowledge & Process Learning

Goal: Complete first 2 weeks understanding our customers and sales process. By end of week 2, you should understand our customer base and core sales methodology.

- Shadow all customer calls and internal sales calls; attend as many as possible
- Provide initial feedback to sales reps on calls observed
- Daily sync and Q&A sessions with Amanda
- Set up weekly 1:1 syncs with direct reports
- Run sales standups starting Week 2
 - [Name] will join standups in Week 1

Week 3: Pipeline Management

- Run pipeline review starting Week 3; make adjustments as needed
 - [Name] will run pipeline reviews for Weeks 1 and 2
- Spend 2-3 days directly selling deals with Amanda's support

Week 4: Active Selling

- Spend 20% of time selling deals (approximately 1 day per week) with Amanda's assistance

60 DAYS: OWNERSHIP & TEAM DEVELOPMENT

Weeks 5 & 6: Sales Execution & Coaching

- Continue spending 20% of time selling deals (roughly 1 day per week); Amanda will assist
- Develop strong understanding of team dynamics and strategy
- Take over all 1:1s with direct reports
- Regularly coach sales reps on strategy and execution
- Continue shadowing select customer calls
- Begin developing 2025 planning materials

Weeks 7 & 8: Strategic Planning

- Continue autonomous selling (20% time, roughly 1 day per week)
- Finalize 2025 strategic plan
- Build reporting structure and cadence

90 DAYS: FULL OPERATIONAL OWNERSHIP

Frontline Sales Manager Core Competencies

Product Mastery

- Answer all technical questions reps encounter
- Fully own sales coaching responsibilities
- Close 1 customer deal independently

Vendor & System Knowledge

- Know who to contact for specific tasks and questions
- Master content in Notion: Contract Redlines, Security Review, and Vendor Onboarding processes
- Understand when to escalate product questions
- Ensure CRM hygiene is maintained (reps frequently forget to finish tasks or clean up pipelines)
- [Additional system knowledge items]

Rep Enablement

- Help reps set up sales plans
- Guide reps through edge-case situations (reference: [this document])
 - Understand when situations require escalation to Amanda
- Create and validate discount approval plans when reps request double-checks
- Create and manage test instructions for prospects

Sales Operations

- Help reps create customer accounts in systems
- Understand how the trial banner process works
- Own the trial-ended channel communications
- Remind reps to remove trial banners at appropriate times
- Handle mock account creation requests

Financial Operations

- Own invoice collection process (coordinate with Amanda); review past due invoices after 30+ days
- Manage commission calculation (coordinate with Amanda)
- Own revenue sheet calculations each financial close
 - Understand Revenue Calculation Rules
 - Master Revenue Calculation Rules Explanation
- Handle out-of-office (OOO) coverage requests
- Manage rep bday presentation responsibilities
- Own 1-year work anniversary recognition procedure

Documentation & Process Management

- Document processes sales managers need to know (located in Notion under Manager Processes)
 - Examples: invoice collection, commission calculations, revenue sheet management, OTS process
 - Document all non-IC work required in role; essential for onboarding future sales managers
- Prepare materials for board meeting

Hiring & Team Growth

- Master ATS (Applicant Tracking System) without external help
- Shadow Amanda's AE interview process by watching 10 first interviews
 - Review Amanda's First Screen Interview approach
- Send Amanda your first 10 interviews for review (reverse shadowing)
 - Review sample candidate interviews
- Articulate company mission and background (reference: [this doc])
- Build relationships with sales recruiting firms
 - [Firm names]
 - Communicate any new AE hiring requirements
- Take over sales rep hiring process (sourcing/training/raising the bar)
- Successfully onboard one AE

These frameworks were brought to you by Recall's Co-founder and COO Amanda Zhu. If you're interested in learning more GTM best practices and frameworks, [subscribe to Bessemer for more quick reads.](#)