

# New Rep Onboarding Blueprint

AE · BDR · SE · CSM

A 30/60/90-day onboarding framework for AE, BDR, SE, and CSM roles - built around competency milestones and live certification, not passive content completion. Reps graduate each phase by demonstrating capability, not finishing a course.

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## 01 Account Executive

*Closing role · manages full sales cycle from discovery to contract*

A 30/60/90-day onboarding framework built around competency milestones rather than check-the-box tasks. Reps graduate each phase by demonstrating capability in a live or simulated environment - not by completing a course.

The fastest path to first deal is not more content - it's deliberate practice with fast feedback loops. This blueprint front-loads product fluency and discovery skills, then layers in deal management and territory strategy as the rep builds confidence.

### 30 / 60 / 90-DAY PHASES

<b>Days 1-30 · Foundation</b>	<b>Days 31-60 · Practice</b>	<b>Days 61-90 · Performance</b>
Product fluency, company history, ICP and personas, tech stack onboarding, shadowing calls, value proposition internalization. Cert: 10-minute product demo to a panel.	First discovery calls (with manager or senior rep), objection handling drills, pipeline development, first proposal. Cert: live discovery call scored by manager.	Independent territory, pipeline to 3x quota coverage, first close attempt. Manager shifts from active coaching to deal support. Cert: pipeline review with VP Sales.

### CERTIFICATION MILESTONES

PHASE	MILESTONE	ASSESSMENT METHOD	PASS CRITERIA
<b>Days 1-30</b>	Product Certification	Demo 10-minute demo to a panel of 3 (manager, senior rep, CS)	Panel scores $\geq 4/5$ on product knowledge, value framing, and handling one objection
<b>Days 1-30</b>	ICP & Personas Quiz	Written assessment + roleplay as a Tier 1 prospect	90% on written · Panel confirms persona fluency in roleplay
<b>Days 31-60</b>	Discovery Certification	Call Live discovery call with a real prospect, reviewed by manager	MEDDPICC fields 80%+ populated post-call · Buyer advanced to Stage 2
<b>Days 31-60</b>	Objection Handling Drill	10 common objections delivered cold - rep responds in real time	Score $\geq 4/5$ by manager on value reframe, empathy, and no defensive responses
<b>Days 61-90</b>	Pipeline Review	Live pipeline review with VP Sales · All open deals walked	3x quota in Stage 2+ · All commit deals meet stage exit criteria · No deals older than 30 days with no movement
<b>Days 61-90</b>	First Close Attempt	AE manages their first deal to close independently	Deal closed or in legal/contract - rep owns the process without manager handholding

*Pipeline sourcing role - cold outreach, prospecting, and qualified meeting creation*

BDR ramp is about sourcing quality, not just volume. This blueprint builds ICP precision first, then outreach mechanics, then independent pipeline generation - where performance is measured by meeting quality and AE acceptance rate, not headcount of activities.

The fastest path to consistent pipeline is owning your ICP deeply enough to write messaging that resonates, not deploying high-volume sequences that train buyers to ignore you. BDRs who nail the first 30 days on targeting almost always outperform those who sprint straight to outreach.

**30 / 60 / 90-DAY PHASES**

<b>Days 1-30 - Foundation</b>	<b>Days 31-60 - Practice</b>	<b>Days 61-90 - Performance</b>
ICP targeting, buyer personas, messaging framework, sequencing tool onboarding, cold call fundamentals, CRM hygiene. Cert: cold call roleplay - 5-minute opener to a skeptical prospect.	Live sequences running, active cold calling, first meetings booked, connect-rate and reply-rate tracking. Cert: book 3 qualified meetings with manager observing at least one live call.	Independent outreach at quota, AE handoff process locked in, conversion data driving sequence iteration. Cert: AE acceptance rate review and pipeline sourcing contribution audit.

**CERTIFICATION MILESTONES**

PHASE	MILESTONE	ASSESSMENT METHOD	PASS CRITERIA
<b>Days 1-30</b>	Messaging & ICP Cert	Roleplay: 5-min cold call opener to a skeptical prospect, scored by panel	Manager >=4/5 on hook quality, ICP fit identification, and clear call-to-action
<b>Days 1-30</b>	Tech Stack Proficiency	Sequencing tool audit - sequences built and reviewed by manager	2+ active sequences live, CRM records clean, no data hygiene errors flagged
<b>Days 31-60</b>	Meeting Milestone Booking	Book 3 qualified meetings - at least 1 observed live by manager	Meetings accepted by AE; Stage 1 MEDDPIC fields complete at handoff
<b>Days 31-60</b>	Objection Handling Drill	8 cold-call/email objections delivered cold - rep responds in real time	Score >=4/5 on deflect, reframe, and book-not-pitch response pattern
<b>Days 61-90</b>	Outreach Attainment Quota	Meeting-booked quota tracked across the full Days 61-90 window	>=80% of meeting quota hit with >=60% AE acceptance rate
<b>Days 61-90</b>	Handoff Quality Review	BDR manager + AE audit of 5 recent handoffs	All 5 have Stage 1 MEDDPIC complete; AE confirms meeting quality >=4/5

Technical pre-sales role · owns demo, POC, and technical close alongside the AE

SE onboarding prioritizes technical depth before customer exposure. Reps build demo fluency and integration knowledge in a sandbox environment, then earn their way into live deals through supported technical discovery - before owning the full technical close process independently.

The fastest path to effective technical selling is knowing the product deeply enough to improvise under pressure. SEs who skip the sandbox phase and jump to customer calls tend to undermine AE credibility when they need to 'check with engineering' on basic questions. Depth first, exposure second.

30 / 60 / 90-DAY PHASES

<b>Days 1-30 · Foundation</b>	<b>Days 31-60 · Practice</b>	<b>Days 61-90 · Performance</b>
Deep product and architecture mastery, integration landscape, API familiarity, sandbox setup, competitive technical positioning. Cert: 20-minute technical deep-dive demo to AE + engineering lead.	Shadow technical discovery calls, assist on POC scoping, deliver a custom demo to a live prospect alongside a senior SE. Cert: solo technical demo to AE + manager panel.	Own the technical track on 2+ active deals - POC design, execution, and readout. Manager for escalation only. Cert: POC readout to a mock customer panel.

CERTIFICATION MILESTONES

PHASE	MILESTONE	ASSESSMENT METHOD	PASS CRITERIA
Days 1-30	Technical Demo Cert	20-minute demo to a panel of AE + engineering lead	Panel >=4/5 on accuracy, integration depth, and handling 2 technical objections
Days 1-30	Architecture & Integrations Quiz	Written assessment on product architecture, API, and 3 key integrations	>=90% written score; SE lead confirms depth in debrief conversation
Days 31-60	Custom Demo Build	Build a prospect-specific demo reviewed by SE manager before live delivery	Demo is accurate, customer-relevant, highlights correct use cases; no technical errors
Days 31-60	Supported Technical Discovery	Co-lead a technical discovery call on a live deal with a senior SE	Senior SE scores >=4/5 on question quality, gap identification, and written follow-through
Days 61-90	POC Execution	Run a full POC - scoping, delivery, readout - on an active deal	Delivered on time; AE rates readout >=4/5 on technical clarity and customer alignment
Days 61-90	Independent Technical Close	Own technical track on 2 active deals without manager involvement	Both deals advance past technical validation; SE manages objections and escalations independently

## 04 Customer Success Manager

*Post-sale role · owns onboarding, retention, expansion, and customer health*

CSM onboarding centers on time-to-value for the customer - not just internal readiness. This blueprint layers product expertise with customer journey mastery, then transitions the CSM from observer to owner with a structured account handoff at each phase.

The fastest path to a healthy book of business is owning the onboarding experience with confidence from day one. CSMs who shadow too long before taking accounts often develop a passive posture that's hard to undo. This blueprint accelerates ownership while keeping the manager in co-pilot through Day 60.

### 30 / 60 / 90-DAY PHASES

Days 1-30 · Foundation	Days 31-60 · Practice	Days 61-90 · Performance
Product mastery from the customer lens, CS platform onboarding (Gainsight/ChurnZero/Vitaly), customer journey mapping, escalation protocols. Cert: walk a mock new customer through the first 30 days of onboarding.	Shadow QBRs and EBRs, take on 5 accounts as primary CSM with manager co-pilot. Run first renewal conversation. Cert: solo QBR to a real customer, scored on prep quality and action ownership.	Manage full assigned portfolio independently - health scoring, risk identification, expansion conversations. Escalate only for legal or exec-level issues. Cert: portfolio health review with CS leadership.

### CERTIFICATION MILESTONES

PHASE	MILESTONE	ASSESSMENT METHOD	PASS CRITERIA
Days 1-30	Onboarding Walkthrough Cert	Walk a mock new customer through the 30-day onboarding sequence	CS lead $\geq 4/5$ on product accuracy, timeline clarity, and customer-ready communication style
Days 1-30	Platform Proficiency	CS tool audit - health scores, playbooks, and alerts configured in tool	5+ accounts loaded with health scores, playbooks assigned, and alerts live
Days 31-60	First QBR Cert	Solo QBR to a real customer, observed by manager	Manager $\geq 4/5$ on prep quality, health narrative, and ownership of action items
Days 31-60	Renewal Conversation Drill	Roleplay: renewal for an at-risk account delivered cold	Score $\geq 4/5$ on risk acknowledgment, value reframe, and escalation judgment
Days 61-90	Portfolio Health Review	Full portfolio review with CS lead - all accounts assessed	All accounts have current health scores; risk accounts have active playbooks; no surprise churns
Days 61-90	Expansion Opportunity	Present 1 expansion opportunity to CS + AE leadership	Opportunity is ICP-qualified, business case is sound, AE confirms viability

*Certifications are live and observed - not multiple choice. Ramp periods should be re-baselined annually using actual time-to-first-deal data. Adapt phase milestones as the product, ICP, and market motion evolve.*