

On-boarding Plan: Sales

Steve's Engine Services

Table of Contents

Expectations for Sales Positions at Steve's Engine Services Ps 3 - 5

- Daily P 3
- Wednesdays P 3
- Special occasions P 4
- Quotes / Proposals P 4
- Sales process P 5

Training overview Ps 6 - 9

- Things Steve can do to help Ron Succeed P 6
- Week One Ps 7,8
- Weeks Two through Four P 9

Markers for Success for Sales Ps 10, 11

Weekly Questionnaire for Co-workers P 12

Expectations for Sales Positions at Steve's Engine Services

DAILY:

- Professional attire:
 - Pants pressed
 - Hem straight, not rolled up
 - Steve's Engine Services shirt, clean and pressed
 - No visible tattoos or jewelry
 - Well groomed: hair combed, clean fingernails
- Office time: 7AM – 9AM
 - Create plan for the day
 - Phone calls
 - Check in with Steve
- Time sheets completed at end of each day including:
 - Customer contact including:
 - Name of customer
 - Topic of discussion
 - Potential for additional sales
 - Time, type and length of contact (i.e. 10:30 AM – 11:15 AM, phone contact OR face-to-face meeting)
 - Follow up action required with date
 - Prospective customer contact documented:
 - Time, type and length of contact
 - Name of prospect
 - Topic of discussion
 - Product or service of interest or need
 - Follow up action required with date
 - Travel time, including:
 - Departure place and time and arrival time and destination
 - Person contacted
 - Length of contact
 - Purpose of contact
 - Follow up action required with date

WEDNESDAYS: Documentation

- All tasks from the previous week must be completely documented in EBMS
- Description field must say "NEW (equipment make / name)" OR "USED (equipment make / name)"

SPECIAL OCCASIONS:

- NEW equipment delivery:
 - Must be present at delivery
 - Confirm there are no problems with the order and everything is acceptable
 - Complete “New Engine Delivery Report” including signature from customer
 - E-mail to carrier to confirm arrival
 - Note date report was e-mailed
 - Scan and load into EBMS under NEW with serial number within 24 hours
 - Delivery + 2 days: on-site follow up with customer to ensure satisfaction
 - Document contact within 24 hours
 - Delivery + 4 – 7 days: on-site follow up with customer
 - Complete and file warranty paperwork
 - Document contact within 24 hours including:
 - Date and time of contact
 - What transpired
- USED equipment delivery:
 - Face-to-face follow up with customer within one week of delivery to ensure satisfaction
 - Outside of Lancaster and Chester counties phone follow up is acceptable
 - Document contact within 24 hours including:
 - Date and time of contact
 - What transpired
- Trade shows:
 - Day before:
 - Prepare materials minimum of one day ahead of show
 - Review list of potential attendees and exhibitors and identify people to contact
 - Day of:
 - Set up display booth
 - Be attentive to visitors to booth
 - Make connections with identified people and document who they are
 - Day after:
 - Follow up with contacts made
 - Document follow up and contacts

QUOTES / PROPOSALS

- Must be set up in EBMS within 24 hours
- Description field must say “NEW (equipment make / name)” OR “USED (equipment make / name)”

SALES PROCESS (check when complete)

Current customers

- Utilize EBMS to track contacts with current customers including:
 - Company name
 - Address
 - Phone
 - Primary contact name
 - Primary contact e-mail and phone
 - Preferred contact type
 - Last contact
 - Type of contact (phone, face-to-face, trade show, etc)
 - Products or services presented
 - Total sales (last fiscal year)
 - Total sales (YTD current fiscal year)
 - Most recent purchase
 - Quotes provided
 - Next follow up

Prospective customers

- Create an excel spreadsheet listing all potential customers within specified geographic area (Lancaster and Chester counties). Include:
 - Company name
 - Address
 - Phone
 - Person most likely to be the primary contact
 - Product or service they might be interested in
 - Type of contact to be made
 - Date of contact made
 - What transpired
 - Quotes provided
 - Next follow up

Training Overview

BEFORE DAY ONE (check when completed)

- Send Ron a hand-written note telling him you are looking forward to his being part of the team. Let him know the importance of his role and your confidence in his ability to succeed.
- Review assessment results to understand how Ron is motivated and what communication style will be most effective with him.

Things Steve Can Do to Help Ron Succeed

1. Review Expectations of the Job, Markers of Success and Training Overview with Ron. Clarify and make sure he has no questions.
2. Tell him where to go for help in different areas.
3. Briefly review (or ask synergize! to review) his assessment results. Ask him (1) what motivates him (suggestions are on his DISC report) and (2) what he needs from you as his manager (also on his DISC.)
4. Ask Larry to delegate tech to get products in Rental Fleet ready for rental.
5. Provide list of products in Rental Fleet to Ron and techs.
6. Look for opportunities to share your knowledge with Ron so that it becomes his knowledge. Considering doing this over some lunch hours. This will ultimately take responsibilities off of you.
7. TELL HIM WHEN HE DOES THINGS RIGHT.
8. And tell him – immediately - when he can do something better, and how to do it better. (“We find it usually works better to ...” or “I’d like it if you would ...”)
9. Check in with him every day for the first week to see how he’s doing and if he needs anything. Then check in with him a couple of times a week for the first month.
10. At the end of 30 days, 60 days, 90 days, 120 days, 180 days sit down and have a longer (but still brief) conversation about how it’s going – from him and from you. Ask him what he needs from you, and tell him what you need from him. Review the information provided by co-workers from their weekly questionnaires.

On-boarding Plan: Ron Jones - Sales



WEEK ONE

- To do:
 - DL check
 - Physical
 - Drug screen
- **Monday**
 - 7:00 – 9:00 Kevin
 - Provide keys to van, tablet and phone + instructions on use (mileage tracking, gas, etc.)
 - EBMS training basics + Outlook calendar use
 - End of day:
 - ✓ Ron can enter time in EBMS
 - ✓ Ron understands basics of putting Tasks in EBMS
 - ✓ Ron can put appointments and tasks in Outlook Calendar
 - ✓ Ron has basic understanding of billing system (*depending on time*)
 - 9:00 – 10:00 Steve
 - Review “Expectations and Markers of Success”
 - Brief tour of facility and introduction to people
 - Introduction to Black Book
 - ✓ Explain each category
 - ✓ Show him where to find information
 - 10:00 – 12:00 Set up Office
 - Review boxes of literature: clean up, organize information and office
 - 12:00 – 1:00 Lunch with Steve
 - Review information needed + overview of process to add info to Black Book and website for new Product
 - 1:00 – 1:30 Set up Black Book
 - Start getting information for personal Black Book
 - 1:30 – 3:30 Janet
 - Learn how phone system works
 - Find out who to refer calls to and how to transfer them
 - Review data entry system
 - 3:30 – 4:00 Office time
 - Continue setting up office, literature and Black Book
 - Enter plan for Tuesday in Outlook
 - Log time in EBMS

On-boarding Plan: Ron Jones - Sales



- **Tuesday ***

- 7:00 – 12:00 Answer phones
 - Familiarize with phone system and data entry
- 12:00 – 1:00 Lunch
- 1:00 – 4:00 Meet with Kevin / answer phones as needed
 - Review billing system in EBMS with Kevin
- Log time in EBMS

* *It will benefit Ron to accompany Steve on any sales calls or showing product to customers on site*

- **Wednesday Larry and John**

- Spend time with Larry and John
 - Observe and talk with Larry and learn about what he does
 - Observe and talk with John and learn about what he does
 - ✓ Help John put parts away if possible
 - ✓ Become familiar with system of where parts are
- Half-day shadow with Carl (day TBD based on schedule)
- Half-day shadow with shop tech (day TBD based on schedule)
- Deliver parts or accompany somebody on parts delivery

- **Wednesday, Thursday, Friday**

- Review customer list and sales (last year and YTD) from each customer
 - Differentiate rental vs. sales customers
- Create contact list
 - Prioritize based on sales, last contact and location
 - Identify plan to contact top customers (put contact plan in Outlook)
 - ✓ Include primary contact
 - ✓ Date to contact
 - ✓ Means of contact (phone or face-to-face)
- Review product sales last year and YTD
 - Review specifications for products that sold the most
- Log time in EBMS

On-boarding Plan: Ron Jones - Sales



WEEK TWO

- 7:00 – 9:00 Office time for planning, helping out where needed
- Identify any area to review to gain more knowledge
- Set time with Kevin
 - Learn how to add Tasks and Contacts in EBMS
 - Review billing system – rentals and sales
- Continue to shadow Steve for any sales calls / demos
- Set time with Steve or Kevin to review quoting and proposal process
- Deliver parts as able
- Work on plan to contact top customers (put contact plan in Outlook)
 - Include primary contact
 - Date to contact
 - Means of contact (phone or face-to-face)
- Contact top 5% or more customers on contact list created last week
 - Add contacts in EBMS

WEEK THREE

- 7:00 – 9:00 Office time for planning, helping out where needed
- Set time with Kevin
 - Learn next steps with EBMS
- Continue to shadow Steve for any sales calls
- Deliver parts as able
- Contact next top 5% or more customers on contact list
- Identify top potential prospects
 - Prioritize based on number of contacts, last contact, location and viability (they initiated contact)
 - Create contact plan for prospects (add to Outlook)
 - Include primary contact
 - Product they're interested in
 - Means of contact
 - Contact top 20 or more prospects

WEEK FOUR

- 7:00 – 9:00 Office time for planning, helping out where needed
- Meet with Steve for progress review; identify any area to work on or gain more knowledge
 - Discuss potential trainings
 - Continue to create and carry through with contact plan for customers and prospects
 - Learn how to add information to website
 - Familiarize with products in “rental fleet”

Markers of Success for Sales

WEEK ONE

- Completes Time Sheets daily
- Met team members and know what they do
 - Spent time with Larry
 - Spent time with John
 - Shadowed Cliff
 - Shadowed shop tech
- Puts appointments and contact plans in Outlook
- Is able to use phone system
- Can complete data entry
- Organized personal office and literature

30 DAYS

- Consistently completes Time Sheets at the end of every day
- Correctly adds Tasks and Contacts to EBMS no later than Friday afternoon
- Completed Black Book set up
- Created a contact list and plan for top customers and prospects
- Has contacted 10% or more of top customers via phone or face-to-face
- Consistently puts plans, to-do list and appointments in Outlook daily
- Accompanied Steve on sales calls / presentations and demos when possible
- Has working knowledge of products and services
- Can enter rental and sales billing information with oversight from Kevin
- Understands quoting and proposal process
- Checked with Steve about potential trainings and trade shows in 2015
- Has met representatives of all major product lines

60 DAYS

- Consistently completes Time sheets at the end of every day
- Correctly adds Tasks and Contacts to EBMS no later than Friday afternoon
- Created and implemented a plan that includes:
 - Regular office time for phone calls, paperwork and general help (preferred time 7:00 – 9:00)
 - Consistent customer and prospect contact times
- Is able to present comprehensive information on products and services.
 - Demo products with oversight
- Completed quote(s) or proposal(s) (EVEN IF IT IS A PRACTICE PRODUCT)
- Has the following information or knows where to quickly access it:
 - Recent demos
 - Outstanding quotes
 - Pending purchases
- Has identified all potential customers in Lancaster County and Chester County

On-boarding Plan: Ron Jones - Sales



- Created a plan to contact all potential customers
- Consistently provides documentation in EBMS on every contact so that anybody can review the documentation and know exactly what is going on with each contact (customer or prospect) at any given time

90 DAYS

- Has contacted 50% or more of established decision-makers for purchasing major product lines
 - Independently conducts sales calls and responds to questions via phone.
 - Demo products with or without oversight
- Created and follows a sales plan

180 DAYS

- Consistently enters Time Sheets on a daily basis
- Consistently enters Tasks and Contacts in EBMS no later than Friday afternoon every week
- Consistently enters plans in Outlook
- Has daily office time for planning, follow up and general help to the team
- Has contacted every established decision-maker for purchasing major product lines
 - Independently conducts sales calls and responds to questions via phone.
 - Demo products with or without oversight
- Maintained or increased sales to current customers
- Has received positive feedback from co-workers and clients
- Gained two or more new customers
- Steve says this was a good hire



Weekly Questionnaire for Co-workers

The following questionnaire is to be completed *at the end of each week for the first four weeks* by those who work most closely with Ron:

- Steve
- Kevin
- Larry
- John
- Carl

Please rate Ron in the following areas using the key below:

- 1 - didn't do this
- 2 - this was okay
- 3 - this was exactly the way we want it

Area to rate	1	2	3
Showed up and was ready to work on time			
Asked good questions			
Showed an interest in what you said or did			
Had positive interactions			
Easy to talk to			
Easy-going (not pushy and didn't react negatively to anything)			
Displayed a helpful attitude			
Other comments or observations?			