Inside Sales Trainer Manual

WEEK 1

- Remember to Cast the manuals on the TV for training in the break room. ☐
- Explain First 40 hours will be spent shadowing and learning a persuasive approach to prospecting with on how to set, second 40 hours will be taking the exam, getting on the phone and doing parts of training with other reps. ☐
- Second 40 hours will be spent shadowing and learning the finer details of the set after covering handbooks in week 1/taking the setting exam - 85% or higher needed to pass. ☐
- Trainees all learn at different speeds, and have different approaches. Let them take their time. Communicate with them consistently to identify their comfort level. Only move-on when the trainee is ready to speak online with customers while the trainer drives. If it takes more than 1 day for a certain task, use more than one day. It is better to take time to get it right before launch than it is to involve others in cleaning up of mistakes; this also reduces the rep's confidence in his or her ability to set appointments, which is debilitating and unmotivating. ☐

Day 1 Paperwork ☐

- New Hire paperwork and on-boarding: By the end of the first day Drug test MUST be performed | Background check must be initiated | I-9 Part 1 and 2 MUST be completed and signed by employee and Hiring Manager | Handbook acknowledgement signed by employee | Emergency Contact Information completed | 2 forms of ID photocopied | Optional - W4 filled out and signed (we will withhold at Single and Zero until received) | Optional – Direct Deposit form (a paper check will be mailed to the address on file until received) ☐

Company Basics

- Show them company structure, your role, stats/stats they'll be measured by, pay, metrics, expectations, average s
- Give them a link to the company handbook and have them read: https://gosolargroup.com/internal/ (Password is sunshine). Get them to sign a document that they've acknowledged they've read and understand handbook. ☐

Equipment and Setup/Support ☐

- Add them to insidesales@gosolargroup.com email list. ☐

  Add them to the inside sales group chat. ☐
- Make sure their dial out number is correct by market in ring central for each one, know what to change, etc. test on your cell phone: Remember to make sure that the trainee changes the number depending on which market they are in. From the home page on the Ring Central site, Select "Settings." From there on the left-hand side, click "Outbound Calls/Faxes." From there hit "Caller ID" The top section where it says "By Phone" is the number that will need to be changed. There is one for UT, one for NV, one for San Antonio and one for New Mexico. Make sure the correct number is listed before calling leads within that market. You can test by calling your own cell phone and making sure the correct number appears.☐
- Get splitters ready for shadowing ☐
- Give them digital copies of handbooks/print them for training. Explain that handbook 1 is persuasion and process. Explain that handbook 1 is persuasion and process. Handbook 2 is using the system correctly. Handbook 3 is ethics and code of conduct. ☐
- Give Mauz and Daniel and Laura (or other trainee) $50 in training from spiff allotment/mark it in IS spiff doc. ☐

How to Conference in power company

- Hit "more", "conference", then dial the power company number (always make sure to dial a "1" before the number.) ☐
- Once the power company is on, hit "conf" again to bring the customer back onto the conference call. ☐
- Once the call is over with the power company, they can simply drop-off and it will just be the associate and the customer.

Setting up the splitter for shadowing - items needed - 2 headsets, splitter, test call to james's cell phone. ☐

- Plug the splitter into where the headset normally goes. ☐
- Connect the 2 headsets to the splitter jack. Some of the old ones don't work, so always make sure to test before use by calling someone's cell phone and making sure you can hear and be heard. ☐
- Rely on Cydni if you have questions here. She is the one who gets everyone set up and makes sure phone lines are working correctly. ☐

- Follow splitter visuals in training folder ☐
- Give splitters back to James at the end of each day. ☐
- Show them Zoho CRM dashboards and what they measure ☐
- Explain to them that everything I cover is going to be in all the handbooks, which I will send digital copies for. Rely on your team members and the manuals to answer any questions you have. Read handbooks IN ORDER. ☐
- Tell them there will be a quiz on material covered in training and handbooks at the end of week 1. And they'll need an 80% to pass. Have to take it continually until they pass. ☐
- Explain to them that I expect them to take notes, and ask them how they learn. Explain encoding dual-action. Writing and listening. ☐
- Get them keycards (if they will be coming in early and closing up shop any day of week). ☐
- Show them how to lock up at night/how to get in. ☐
- Get them hours sheet to log time in until they have T Sheets set up and you explain it to them (if not salaried). ☐
- introduce to everyone in office on day 1 ☐
- Take them out to lunch and pay for it. ☐
- Train them in the first half of handbook 1. ☐
- Shadowing if there's time. Ask the rep to prepare questions for day 2. ☐
- Tell Kory his or her pay structure from the offer letter. ☐
- Invite them to the G Chat for Inside Sales ☐
- Give them updated extension list ☐

Tuesday: Day 2 - Shadow + Handbook 1, Part 2

- Print service maps for them for all 3 markets, show them where they are to left of whiteboard in inside sales room. ☐
- Zachary Bassett call Closed Won website lead. 4358815660, set by Karen Davila, 21-minute call made 12/19/2018. Use sheet in training folder called "Call Recording Fact Sheet" - Bassett - CW - Set by Karen Davila ☐
- Finish going over handbook 1, have them finish reading handbook 1, have them prep questions for the following day. ☐
- Shadowing if there's time. Put on the speaker if the splitter isn't working. ☐
- Show them an assessment, and what it means. ☐

Wednesday: Day 3 - Shadow + Handbook 2, Part 1

- Go over the first half of handbook 2. ☐
- Give them link to the time off request form, make them bookmark it in browser. ☐
- Show them how Zoho is structured. Zoho Leads (Show lists 1-10 in each market, cover tabs that must be open. TransUnion, Google Calendars, Zoho Calendar, Ring Central. ☐
- Share kWh sheet with them. Tell them to bookmark it in drive. ☐
- Passwords - tell 'em to remember Gmail password/put it on desk as sticky note, or memorize it, then have a passwords sheet in their own Drive passwords for t sheets, ring central, zoho, transunion, Google maps, bing, etc. show 'em an example. ☐
- why clearing the cache is important/not to have too many tabs open at once for faster pace, better customer service. ☐
- Role playing if necessary ☐
- Shadowing if there's time. Put on the speaker if splitter isn't working. ☐
- Tell them to prep questions for the next day if they have any. ☐

Thursday: Day 4 - Shadow + Handbook 2, Part 2.

- Cover part 2 of handbook 2 with James. ☐
- Role playing and shadowing. ☐
- Once a trainee is comfortable with the regular script and voicemails move onto the next part of training. ☐
- Tell them to prep questions for tomorrow if need be. ☐
- Shadowing if there's time. Put on speaker if the splitter isn't working. ☐

Friday: Day 5 - Shadow + Handbook 3

- Share Zoho Inside Sales Dashboard/Put them on There ☐
- Elevator speech: 2 important questions: 1) why go solar, and 2) why go solar with us? ☐
- Share all 4 Google calendars with them, make sure they know how to access Zoho Calendars in Zoho.
- Make sure their timezone is not in Greenwich in Zoho, but set to MST. - to check this, In Zoho, click the tool icon in the upper right-hand corner of the screen. Then, Under "General" click "Personal Settings" Then, Under "Locale Information" make sure their time zone is selected as "Mountain Standard Time." If it's not MST, let Cydni know she can change. ☐
- Finish covering handbook 3. ☐
- Do role playing for a couple hours to make sure they're ready to execute script on the fly. ☐

- Schedule monthly one on one time (weekly for IS Manager). ☐
- Send them calendar invites for weekly team meetings that fits their schedule (both meetings for IS Manager. ☐
- Schedule 90-day review. ☐
- Print an updated calendar for the whole team so they know when to set tasks for each other. ☐
- Get them copies of service maps Madi designed. ☐
- Tell them you encourage them to read handbooks over the weekend so they can come on Monday and crush it. ☐
- Let existing team members know about the shadowing of week 2 plan, they may have to help with training. ☐
- Create a folder for them in the Drive of Inside Sales folder. ☐
- Have the trainee run through the old call script (get file from someone) several times offline and new script (go into break-room and mimic calls). ☐
- Spend as much time off-line practicing as the trainee needs to feel comfortable working through the script and dealing with objections. ☐

WEEK 2 - Putting Principles Into Practice

Monday/Tuesday/Wednesday/Thursday/Friday: 3 Training Sequences

- Collect paper time sheets and make rep start using t sheets (not applicable for IS Manager). ☐
- Before you let them do this part of training, you can encourage them to write everything down that happens on the call, then put the info in the system if they need time to process it all. ☐
- Also, if they run into anything that differs from what I've told them, excluding setting parameters like usage and credit, to defer to the trainee, because they are in the system and using it every day, whereas I'm not. ☐
- If the splitter isn't working, put the phone on speaker and do it that way. ☐

- Once comfort is reached here, have the trainee both drive and speak while the trainer sits with them for damage control. Once they are comfortable speaking and driving together and successfully working through all processes, set them free!!!!
- Make sure that trainee can successfully run through all parts of the conversation - including the set and scheduling and any and all objections. (Below) ☐

Sequence 1: Trainee Speaks While Trainer Types

- Have the trainee only focus on the verbal parts of the regular and voicemail scripts while the trainer takes care of driving responsibilities. The non-new rep then does Everything that is involved in the set from marking things on Zoho, credit checking, calendar processes, pulling up maps, adding events, etc. All computer stuff from start to finish in real-time, make sure the trainee watches this and gets it. ☐
- If the splitter isn't working, put the phone on speaker and do it that way. ☐

Sequence 2: Trainee Types While Trainer Speaks

- Get them on the phone and pulling credit from splitter recording, converting opp, inputting usage, writing notes, verifying taxable income, homeownership, using the calendars, etc. while someone else is on the phone talking for them. ☐

Sequence 3: Exam

- Share Reno Test, SLC Test, San Antonio Test Google calendars with all people taking exam/check their own zoho calendar to make sure it's working. ☐
- **Give them quiz 1 and quiz 2 before they start shadowing/Score Answers. Minimum of 85% is needed to pass. If they don't pass, go over answers one more time with them and explain why they're wrong - make them take it again. Make sure they take the quiz away from a computer or other digital resources.** ☐ Part 1 of exam is closed book. Part 2 (computer portion) is an open book. Give them a quiz before they start calling /Score Answers. Minimum of 85% is needed to pass. If they don't pass, go over answers one more time with them and explain why they're wrong - make them take it again. Make sure they take the quiz away from a computer or other digital resources. ☐
- Cancel the fake appointments they set and create disposition for it that won't count against the cancellation rate. ☐

WEEK 3: Post-Training Monitoring/Disbursements

- Be available for the first few weeks to walk them through a complete set and monitor to make sure they are adding the event correctly and that notes are complete, time zones accounted for, etc. ☐

- Have them alert MKB or any other rep when they get a set, so you can sit with them and walk step-by-step through the process of converting and adding the appointment (All processes are underlined in the handbook). ☐
- Always be available for questions, coaching, and continual improvement. ☐
- Quality check their sets for the first couple of weeks to make sure nothing is being missed. ☐