RODNEY WEBB UNIVERSITY

New Hire Insurance Training Outline

Introduction

This outline is written to help you, the Sales Manager, know the intent, expectations, and goals of training. Instructions have been written on an hourly basis. It is important to read the entire outline and familiarize yourself with the training before you begin to teach it. Having a comprehensive understanding of the overall schedule, outline, and expectations is important to stay on track and not get behind, ahead, or sidetracked during training.

One important reality is this training has been designed under the assumption that the trainees are coming to us without any prior sales experience or training. We are creating them from scratch and thus it is important to remember that our system in its entirety is overwhelming for beginners. There are many elements to our system that are extremely important and we expect everyone who has been trained to use them. However, many of these are not essential to start selling. Our new hire training is not designed to give the trainees every tool available, but rather to give them the bare minimum to ensure early success. The overall philosophy is to give them the bare minimum and have them master it before introducing anything else.

Week 1
Monday – W1

The first 15 minutes of the new hire's first day will be remembered for the rest of their time here. It is very important to make sure that the first impression is a good one. We also want to capitalize on this window to communicate the fundamental information that we want the candidate to never forget.

- Be prepared – It is very important to be prepared for the new candidate BEFORE they arrive. The candidate should and probably will arrive early which means that we should be ready for them ahead of time. If they arrive early and we simply tell them to have a seat and wait, this completely undoes any preparation that may have been done and ruins our opportunity for a proper first impression. The Sales Manager should be completely ready for the new candidates to arrive and available to spend time with them no later than 8:30 AM (30 minutes ahead of time). Coffee and breakfast snacks should be available for them, to ease any awkwardness on their part, during the wait time before the training starts. The Sales Manager should be prepared to have small talk with the candidates and make them feel at ease during this time. Discussions about any work (especially their new position) should be avoided during this time. Remember that first impressions are everything. Using personal information gathered from their resume and previous interviews should be brought up during the small talk to make each new hire feel valued, important, and know that you are interested in them not only professionally, but personally as well.

9:00 AM

- Start ON TIME. Remember, we are setting standards and establishing habits. Even if another candidate is late, go ahead and start with those that are on time.

- Begin by thanking them for being there. Acknowledge that we know that this was a big decision. Any new job, especially a commission job, is a leap of faith and we greatly appreciate and respect that.

- Let them know that your job is to make them successful and that you will do everything within your power to do so.

- Explain that we have a step-by-step system for everything that we do here and our method is to make them successful one step at a time until they can put them all together.

- Reassure them that they will have a mentor and/or teacher beside them the entire way making sure they are ready before we send them out on their own.

9:15 AM

- Read your mission statement and tell them about your company. This kick off is an important time for them to get their excitement up, so make sure you bring the energy. Some examples of things you may want to cover with them could be:

    - We model professionalism – Our professionalism is what sets us apart. People do not expect it, it is refreshing, it builds confidence, and it impresses our customers. Our professionalism is how we win business and how we maintain our reputation. This is something that we take very seriously here, from the clothes you wear, the vehicle you drive, the words you speak, the presentation you give… all of it matters. Our goal is to run our business as a white-collar, world-class, professional organization in a historically blue-collar, historically poorly represented industry.

    - We work as a team – There is strength in numbers. We take great pride in the culture and team spirit we have developed here. We are all driven to succeed, but not at the expense of those on our team. We recognize the importance of operating as a team and are committed to investing in the others on our team as well as allowing them to invest in us. Our goal is for everyone on our team to make an intentional effort to help the others on their team succeed as well as themselves.

- We demonstrate appreciation – No matter how successful we become, whether as individuals or as a company, we recognize that we have not achieved this on our own. It is through the leadership, effort, example, trust, and commitment of our fellow employees, customers, and partners that have helped us achieve what we have. Our goal is to make sure that we are continually demonstrating appreciation to every level for their importance of our overall success.

- Opportunity – With our emphasis on people development, we recognize that our ability to grow as an organization is directly tied to our ability to train and develop leaders. One of our objectives in our training and development of our employees is to always create new leaders. We have structured our leadership model in a way that limits the number of direct reports to any given leader to a small group so that each leader can give a significant amount of time and attention to each person on his/her team. This small ratio requires us to continually fill new leadership positions as the team continues to grow. Our goal is to create opportunity in each department that encourages and allows for our most successful employees to stay with our organization for their entire career.

9:45 AM

- Set the expectations that your company has.

    - Explain that we are committed to their success, but we do expect the same level of commitment out of them. We cannot help them if they do not want to help themselves.

    - We will not ask them to do anything that we are not willing and able to do ourselves and we do expect them to do what we ask.

    - Have each of them look at the training schedule and explain that there is a huge time commitment required of them and we expect each of them to give 100% effort during this training time.

    - As long as they continue to give us 100%, we will work with them individually to get them where they need to be.

    - If we find that they are not giving 100% or they are not able to keep up, we believe it is important to fail quickly. We do not believe it is fair to either party to waste time continuing training if we feel that they are not going to succeed. We will tell them what they need to improve on, and if they are unable or unwilling to do so, we will let them go.

- We are not saying this to intimidate them or scare them, explain that we are not a company who simply hires anyone and waits to see who makes it and who doesn't. Explain that we are 100% committed to their success as well as the company's success and we are not willing to drag them along if we do not feel they have what it takes to succeed.

- Explain that on the flip side, if they are still here it is because we believe they have what it takes.

9:50 AM Break

10:00 AM Steps 1 & 2 of Opportunity Knocks

- You only have about 60 minutes to work on this, so get to the point quickly and keep it basic.

- Begin by giving a full demonstration of Opportunity Knocks.

- For the remainder of the time, role-play with them READING the script directly from the paper.

11:00 AM Sales Meeting

12:00 PM Catered Lunch

12:30 PM

- This morning was all about introductions to our company, Opportunity Knocks, and the team. Now it is time to really start the practice.

- Spend the entire block working on Steps 1 & 2 of Opportunity Knocks.

- The method below has been very effective in getting them to recite Steps 1 & 2 by the end of the first day. It incorporates both repetition and visual learning techniques. When reciting below, they are free to look at the white board.

    - Have them begin with only the first sentence. Have each person recite it from memory.
        - Write "Intro" at the top of the white board.

- Work on the second sentence until they can recite it.
  - Write “Wind Storms” below “Intro” on the white board.
  - Have them recite the two sentences together.

- Work on the third sentence until they can recite it.
  - Write “75 Years” below “Wind Storms” on the white board.
  - Have them recite the first three sentences together.

- Work on the fourth sentence until they can recite it.
  - Write “Certified Inspector” below “75 Years”.
  - Have them recite the first four sentences together.

- Work on the fifth sentence and the first question of Step 2 until they can recite it.

- Explain that the “….” at the end of the fifth sentence means don’t stop, roll right into Step 2.
  - Write “Free Inspections” below “Certified Inspector”.
  - Have them recite all of Step 1 and the first question of Step 2.

- If there are enough people, after they have each recited it individually, have them do a round-robin style practice.

- If time allows, you can have them recite it as you erase the white board reminders one at a time, beginning at the top with “Intro”. The goal of this exercise is to have them recite it completely without any visual reminders.

- At the end of the block, let them know that they need to practice Steps 1 and 2 tonight and be able to recite them by tomorrow morning.

- Make sure that they know to bring a pair of gloves tomorrow morning.

- Explain to them where they will be going this afternoon. Give them an address to meet the Sales Manager and let them know what time to be there.

- Make sure they know that this evening they are simply going to shadow the Sales Manager or another rep.

2:00 PM End

HOMEWORK: University Lesson Semester 1 up through Opportunity Knocks Class

Field Work

- The goal for them today is to go out and watch how Opportunity Knocks is performed in the field. They are not to attempt to do anything on their own, just observe.
- Absolutely NO climbing on roofs. They will have an opportunity to do this tomorrow after we go over the roof safety training.
- The preference is for them to spend most, if not all, of their afternoon/evening with their Manager or a senior rep. This is their first time together and you want them to have an opportunity to get to know each other. The goal is to establish more of a personal relationship with the trainee and this is the first impression and the chance for them to start on the right foot.
- If the senior rep is not available for all or some of the evening it is VERY important to make sure that you have discussed this with the Sales Manager ahead of time and you have a clear plan on when, where, and with whom the trainee will be with. This is their first evening in the field and you want it to be very well planned and thought through. We should operate under the assumption that they are still unsure and insecure about the job and you don't want to make them feel like an unplanned after thought as they get passed between reps.
- When planning their field time, remember that the goal is to have them watch Opportunity Knocks in action so keep this in mind as you determine their schedule for the afternoon/evening. Make sure they are spending as much of their time as possible in opportunities to observe this.

Tuesday – W1

9:00 AM

**** Before this training starts you need to have a ladder outside the office as well as a bungee cord, a RidgePro, cougar paws, gloves, and a tool belt. ****

- Go over the scores on the RWU homework from the night before. Call out the scores as well as how many times people had to take the tests to pass. This will ensure that they watch the videos before taking the quizzes.
- Begin the day by doing a review of Steps 1 & 2. Each trainee should be able to recite completely. Those who practiced the day before should be evident and they should be

called out. Make a big deal about practicing what we are teaching them and let them know this is what we expect.

- Keep the Step 1 & 2 review to under 20 minutes.
- The final 30 minutes of this block should be spent going over roof safety. We want to do this early in the morning to beat the heat during the warmer months.
- Have the trainees put their cougar paws on and meet you outside.
- Go over the following items:
    - Begin by explaining what valleys and hips are
    - Go over how to find the best point of entry for a roof (valleys, hips, etc.)
    - Proper way to extend a ladder
    - Proper way to carry an extended ladder
    - Proper way to lean a ladder against a house
    - How to establish a proper angle of the ladder (arm straight out in front)
    - How to ensure proper footing
    - How to tie off a ladder
    - How to set up a RidgePro
    - How to exit a ladder onto the roof
- Next have each of them climb up the ladder and get on the roof. Make sure you stand at the top of the ladder to help them properly transition from the ladder to the roof.
- While on the roof, cover the following items:
    - How to walk up and down a valley
    - How and why to walk backwards up a roof
    - How to use a RidgePro on the roof

    - How and why to uses ridges and valleys to move laterally across a roof
    - How to walk up and down a hip
    - How to always be aware of what is below them on the roof and to stay aware of items that could break your fall
    - How to properly exit the roof back onto the ladder. Have them practice this multiple times

9:50 AM Break

10:00 AM

****If you don't have a presentation prepared you will need to have damage photos pulled up ahead of time to use in the training****

- In this block, the goal is to teach them what we are looking for on a roof. Do not get into roof anatomy and terminology, this is scheduled for next week. Just show them the basic shingle types and what damage looks like.

10:50 AM Break

11:00 AM

- Introduce Steps 5 & 6 of Opportunity Knocks
- Spend the block working on 5 & 6
- When working on 5 & 6 for the rest of this week, keep the role-play scenarios very basic. The primary thing for them to accomplish this week is memorization. There will be plenty of opportunity in the coming weeks to role-play with more difficult scenarios.

12:00 PM Lunch

1:00 PM

- Review Steps 1, 2, 5 & 6
- Talk about body language at the door and the DOs and DON'Ts of door knocking
    - Sunglasses, hands, position on porch/steps/sidewalk, eye contact, etc.
- Practice for the rest of the block
- Be sure to practice at the door

- At the end, let them know to practice 5 & 6 and have it memorized by tomorrow
- Let them know that the goal for tonight is for them to accomplish at least one successful turn and walk

2:00 PM End

Field Work:

- The number one priority for trainees' field work today is for them to get the opportunity to do Steps 1 & 2 on their own (under supervision). It is preferable that they are with their Sales Manager, but going through the steps is most important. Keep this in mind when planning their afternoon/evening.
- Second to going through the first 2 steps, the additional goal is for them to get on at least one roof and observe an inspection and video.

Wednesday – W1

9:00 AM

- During the 1 on 1's, have the trainees practice Steps 1 & 2 with the existing reps.
- Do not have them work on 5 & 6. The reason is the existing reps will often start throwing the difficult role-plays at the trainees and you don't want this happening during week 1, especially when you're not present to see how the trainees are being taught to respond. Tomorrow will be the day to really work on getting 5 & 6 down.
- Before you begin the 1 on 1's, make sure you go over, with the team, what they should be working on. Make it clear not to work on 5 & 6, you don't have to elaborate on why.

11:00 AM Sales Meeting

12:30 PM Lunch Catered

**** During the lunch break you need to set up a ladder and sample shingles for the next block. Take creased three-tab shingles and slip them under the existing shingles on the roof to use for video training. You should also go ahead and mark the roof with chalk as a sample damaged roof, including a damage count. ****

1:00 PM

- Quickly review Steps 1, 2, 5 & 6

- By 1:15 PM you need to be going over the video outline.

- Go over the video outline in the classroom and have the trainees out on the roof by 1:30 PM shooting practice videos.

- Demonstrate how to shoot a video on the roof using the “damaged” shingles and the shingle count.

- For this initial training, the shingle count should be used for the worst problem to end the video. This is a method that can be used on almost every roof and is the best way for them to initially learn. They will have plenty of opportunity in the field to learn how to use a roof specific item as the biggest problem.

- At the end, let them know that the expectation is for them to shoot at least one practice video on a roof in the field this evening, that we can review tomorrow morning.

2:00 PM End

HOMEWORK: University Lesson Semester 1 up through Identifying Damage Class

Field Work:

- The goal for today is to have each trainee do at least one successful run through of Steps 1 & 2 as well as shoot at least one practice video on a roof. We really want to have this video to review in training tomorrow morning.

- When scheduling their afternoon/evening be sure to put them in as many opportunities to do this as possible.

Thursday – W1

9:00 AM

- Review steps 1, 2, 5 & 6.

- Watch and critique videos from yesterday’s training and in the field.

- Spend the remainder of the block working on videos.

9:50 AM Break

10:00 AM

- Have them each shoot videos until the block is over. Don't take the videos inside to review (we'll watch them tomorrow) but rather critique them on the roof as they finish each one and have them shoot it again.

- Be sure to use a timer while on the roof and let them know if they are too long or short.

- Have them get back up on the roof and shoot more videos.

10:50 AM Break

11:00 AM

**** Before this block begins you need to make sure all their accounts have been set up and you have sheets printed out with all their usernames and passwords on them. ****

- They've spent the last hour on working on videos and climbing on the roof, so this block is designed to give them a bit of a break. This block will be taking a break from "the system" and reviewing CRM entries and setting up their email and calendar.

- Spend about 15 minutes reviewing CRM entries and the correct way to enter statuses.

- Setting up the email calendars can take some time, so start this by 11:15 AM. They each need to set up their company email account on their phones and you need to give them instructions on the following:

    - Viewing other rep's calendars

    - Creating new appointment on other rep's calendars

12:00 PM Lunch

1:00 PM

- This block is to continue working on videos and 5 & 6. This is the last full block to work on these two items before they begin working solo on Saturday, most of the Friday blocks are for review and there won't be a lot of time for practice.

- Use your discretion based on the needs of the trainees to determine what each one needs to focus on.

- Feel free to have some work on shooting more videos and some work on 5 & 6 if necessary.

- Take more of an individual approach to this block. The goal is to make sure that each trainee is at least at a level that they could go through the full Opportunity Knocks on their own if they had to.

- At the end of the block let them know that the goal for tonight is to go through all 6 steps and set their own appointment, with Steps 3 through 6 being supervised.

2:00 PM End

HOMEWORK: Have them Re-Complete all lessons and quizzes up to this point.

Field Work:

- Today the trainees need to be knocking on their own. They've had three days to practice and even if they don't feel completely comfortable, it is important to push them out of their comfort zone and into the "performance zone." Sometimes the reality of failure is what will motivate them to put in the effort and practice to get better and it's better for them to face this now rather than weeks later.

- It needs to be clearly communicated to the Sales Manager or whomever they are knocking with that they are not to be supervised at the door. If they get shut down more than three times by a homeowner who answered the door, then the following should be done:

    - First, the Sales Manager or other rep they are with should have the trainee shadow them while they demonstrate a successful 1 & 2.

    - Second, the Sales Manager or other rep should observe the trainee as they attempt another step 1 & 2.

    - Repeat this process until the trainee completes a successful 1 & 2.

- Today it is important that they complete a successful 1 & 2, so they should not join on an inspection until that has been done. If necessary, the trainee should continue to work on completing a successful 1 & 2 while the Sales Manager or other rep completes the inspection.

Friday – W1

9:00 AM

- Begin by discussing their experiences in the field the previous evening. Hopefully at least some of them were able to set their own appointments.
- Review their videos from the previous evening and offer critique after each one.
- Spend any remaining time working on 1, 2, 5 & 6.

9:50 AM Break

10:00 AM

- This block is scheduled to conduct a full Opportunity Knocks practical exam.
- Each trainee needs to go through all 6 steps, including setting up their own ladder, marking "damage", shooting a video, and setting an appointment.
- You need to evaluate each trainee on the following items:
  - How well they know and follow the script
  - How well they turn and walk
  - Their ability to safely set up a ladder and transition from the ladder to the roof
  - Their ability to move around on the roof
  - Their ability to safely transition from the roof to the ladder
  - Their video
  - Their ability to properly set an appointment using Steps 5 & 6
- After they make it all the way through all 6 steps if you are not satisfied with the results and time permits, have them repeat whichever step(s) needs improvement.
- You only have an hour to complete this and being new, some of them will be slow. Make sure to start on time and move quickly to get each one started. If there are certain trainees that you expect to move slower than others, let them go first so that everyone will have time to finish in the hour.
- At the end of the block make sure they know that they will need their computers after lunch.

10:45 AM Break

11:00 AM Sales Meeting

12:00 PM Lunch

1:00 PM

- Begin the block with showing them how to install the cloud on their computers.
- Show them how to upload videos to the cloud through both the web and the installed software. As long as they don't have storage problems on their computer, the software is the easiest and most efficient way to do the uploads.
- Instruct them to place all videos in the "Inspection Videos" folder and to label each video with the address.
- If any of them are have difficulty getting this completed by 1:15 PM, move on and come back to them after the end of the block. You've still got a lot to cover and you don't want to make everyone wait.
- By 1:15 PM start talking about the numbers. Go over each of their income goals and show them what they'll need to do to reach them.
- Turn this into a pep talk for the weekend. Give each of them goals to try and hit for the weekend and try to end the block on a very positive note with each of them motivated to go out and have a successful weekend.

2:00 PM End

Field Work:

- Today the trainees should begin operating on their own. They should remain in close proximity to either you or another veteran rep, but knocking their own doors, inspecting their own roofs, shooting their own videos, and setting their own appointments. Remember that failure is ok as long as it is managed. For a solid trainee, small failures should motivate them to practice and improve.
- The primary thing to focus on today and Saturday is attitude. This needs to be monitored very frequently (no less than once per hour) throughout the day by the Sales Manager whether in person or on the phone. If at any point the trainee's attitude is going the wrong way, this is probably a result of them struggling with some portion of Opportunity

Knocks. Once the Sales Manager knows what portion they are struggling with, they should coordinate to have the trainee shadow themselves or someone else on this portion until they see it done successfully. This can include:

- Not completing a successful 1 & 2 (turn and walk)
- Getting stopped before they get on the roof
- Having difficulty getting on or moving around the roof
- Not finding damage
- Difficulty with shooting video
- Not able to set appointment

- They don't have to stay with the other person, they should just spend enough time with them to watch how to properly do whichever part they are struggling with.

HOMEWORK: Complete all of Semester 1 of Insurance School

Week 2

Field Work:

- The trainees will only be in the field on Tuesday, Thursday, Friday and Saturday of this week. On Monday and Wednesday the training will end at 5 PM with the expectation and direction to spend the rest of the day practicing on their own.
- While it is great for the trainees to attend demos this week, the primary focus of field time should be setting appointments. The trainees should be attending demos only if they are: A) Clearly not struggling to set appointments or B) If they are unable to work on setting appointments (after dark or raining). There will be more of an emphasis on attending demos next week.
- The trainee should have learned how to properly set appointments last week. If they are still struggling to do so this week, the Sales Manager needs to develop a plan on how to fix the problem.

    - Fixing a new hire that is struggling to set appointments in week 2 is 100% the responsibility of the Sales Manager.

    - Opportunity Knocks is not difficult to learn and trainees who continue to struggle with this should be treated as high-risk, special cases and the Sales Manager needs to spend 1 on 1 time with them, whether in the classroom or in the field, to work on the areas in question and evaluate whether the trainee should continue training.

- Any trainee struggling with setting appointments in week 2 needs to be monitored daily by the Sales Manager. It is imperative that they master this skill no later than the end of this week. Failure to do so should raise consideration for dismissal of the trainee.

Classroom:

- The goal for classroom training this week is to learn the first 6 steps and to be able to successfully perform a mock demo at the conclusion of training. Trainees that are unable to achieve this goal should be considered for dismissal.

Monday – W2

9:00 AM

- Begin with a Saturday report. Saturday was the completion of their first full week at the company and should have been their first full day of prospecting solo. Focus on their personal performance highs from the previous week and point them to the money. Take a couple of minutes to encourage them and explain that the training is designed to push and set them up for success to make the real money.

- Do a quick review of Opportunity Knocks. Do a round-robin practice if there are enough people. This is only a quick review so keep it brief. You should be done with this by 9:30 AM.

- By 9:30 AM you should start helping them set up their email, your CRM, and PowerPoint. All we are doing with the email and your CRM is giving them their login info and showing them how to access them. For PowerPoint, you need to make sure they have it installed on their computer and that it is correctly showing our presentation (specifically the installation video).

9:50 AM Break

10:00 AM

- Demo Step 4 – We begin with this rather than Steps 1 through 3 because the presentation requires the most practice on their own and we want them to start this as soon as possible.
- All we are working on during this period is the presentation through the training slide, no further.
- Begin by demonstrating these slides yourself. Don't do the full presentation, just up through the training slide.
- Next, go back through the slides while explaining them in a little more detail on how to present them.
- End the block by having at least some of them try to go through the slides themselves until break.

10:45 AM Break

- Be sure to break by 10:45 AM so that they have time to hang out and talk with the rest of the team before starting the meeting at 11.

11:00 AM Sales Meeting

12:00 PM Lunch

1:00 PM

- Begin by having them go through the Step 4 slides. Each person should go through it twice in a row, giving a critique after each time.
- Break the slides into 3-4 slide groups. Practice each group before moving to the next group. They have to be able to name the slides in order, for each group, every time before they start performing them. This will help them to be able to hit their transitions between slides as they get better with the skill.
- Once you make it through each block, go through the whole company story together with them once again naming each slide in order before they perform the entire company story.
- The goal by the end of this block is to make sure that they are proficient enough that they can begin practicing it on their own.
- End the block by challenging them to spend time practicing this outside of training. This

is the only way they will get better. Let them know that we did not schedule field time for them this evening so that they would have time to practice on their own.

1:50 PM Break

2:00 PM

- Spend this block going over the installation video. This video takes the most practice, but has the easiest content. Because the pace is already set for them and is quick, there's not much of a personal spin on this. Everyone basically says the same thing.
- Don't spend time trying to elaborate and explain the job components in the video (that will be covered tomorrow). Just focus on saying the words and going through the motions.
- Demonstrate the video once then have them each go through it. Have them each repeat it until they make one successful time through.
- Once everyone has made it through at least once, put the video on loop and spend the remainder of the block having them go through it on repeat without a break.
    - To put the video on loop, you should open the video file outside of the PowerPoint.
- Remember that the goal by the end of this block isn't to have them do the video perfectly, but to make sure that they have enough to be able to start practicing it on their own.

3:30 PM Break

3:45 PM

- Begin by demonstrating the presentation from the installation video through the product demo.
- Again, break the presentation up into smaller slide blocks and don't move on until they are proficient in each block.
- End by encouraging them to spend time practicing this on their own. Let them know that the expectation is for them to know and be able to complete all 10 steps on their own by next Friday. We're going to be spending a lot of time in the classroom but the only way they're going to be ready is to practice on their own.

5:00 PM Break for the day

Field Work:

- The manager is to go out and run a demo with an existing rep. We cant forget about our existing team while we are running hard with the new guys

HOMEWORK: Complete the Insurance Semester 1 through the Installation video on the University

**** You will need to make sure that you have a complete demo kit ready for each rep prior to this training. ****

Tuesday – W2

9:00 AM

- Go ahead and issue each rep a demo kit. This is a long block so have everyone get some coffee and get ready. Take them through each of the parts and pieces so that they know what they are.
- After you show them the product demo, have each of the trainees go through it twice in a row, analyzing it after each time. After each person has been through it twice, spend the remainder of the block continuing to go through it with those that need the most help.
- Break up the product demo into smaller chunks and do more repetition on smaller blocks of info
- The goal isn't to have them doing a perfect product demo by the end of this block, but to make sure that they have enough training to take the demo kits home and begin practicing on their own.

10:30 AM Break

10:45 AM

- Continue to go through the presentation step by step. This can feel very repetitious from a managerial standpoint but it is imperative that we continue to get the new hires the repetitions to make sure they get comfortable.

12:00 PM Break (Lunch on their own)

1:00 PM

- Start this block by congratulating their progress but gear them up for what is in store.
- Continue the presentation training with them by doing the rest of the presentation from the installation video to the end of the slideshow.
- Again, break up into 3 slide blocks, and make the product demo a block that stands alone.
- They still need to name the slides before each performance.

2:30 PM Break for day

Field Work:

- Trainees need to see a demo tonight if possible. Pair them up with an existing rep or yourself to try to have them sit a demo that you perform. No more than 2 people total per demo - one rep or manager and one trainee. We need them to be able to see the process that they are learning in the classroom.

HOMEWORK: Complete through the product demo on the Insurance University

Wednesday – W2

9:00 AM

**** You need to get to the office early to set up a make-shift living room and kitchen table for the training. You also need to put out some magazines and some pictures on the wall that will stimulate the warm up conversation. ****

- Now it is time to revert and teach Steps 1 through 3. At this point, we can teach many things better now because they have a little perspective.

- Go straight out of your company training manual that we provided to teach Step 1. Use the set up and have them knock the door and perform the Company Story on you. Go straight out of the training manual. Explain what we are trying to accomplish during Step 1 and why.

- You need to spend the last 45 minutes of the block teaching and role-playing the transition questions.

- Role-play transition questions. This is important that we keep working them into getting the objection and then releasing the pressure by having them come outside for Step 2.

- Make sure that we have them understand that we need all decision makers present for Step 2. This is a key to making sure that they have early success.

- Make the role-play more challenging as it goes along to ensure that they are ready for the field.

- Before the end of the block, explain how to make the transition and how to get the homeowners outside for Step 2.

10:30 AM Break

10:45 AM Sales Meeting

12:00 PM Lunch on their own

**** Set up a house that you can do inspection training on. This can be a flexible customer or someone from the office. If your office is a house you can do it on that building. ****

**** You will also need a cooler of refreshments if it is too hot or too cold outside. ****

1:00 PM

- Explain SEOCS outside the house

- You need to demonstrate Step 2 to them as a group. Make sure to take your time to answer any questions. This will be a difficult thing to understand.
- The main part of this block is to show them how to set themselves up as the expert. Not sell the reference list.

2:30 PM Break for the day

Field Work:

- Today the goal is for them to be on another demo with the manager or a veteran rep. Trainees should do the Company Story in the house then turn the rest over to the veteran rep. If there is no demo, the goal is to get a same day to make sure we get some reps in with our trainees.

HOMEWORK: Re-complete all the lessons that have been previously done on the Insurance University

Thursday – W2

9:00 AM

- We are going to review the field work for the day. We will review the warm up through role-play and then have them talk through the inspection.
- Most of this block will be spent teaching the 3G's.
- Begin the block by explaining why selling the reference list is important.
- Introduce the 3G's.
- Demonstrate how to do them and spend the remainder of the block having each of them work on them.

10:30 AM Break

10:45 AM

- Role-play on selling the reference list and some basic rebuttals. We need to make sure that we get this perfect.

- Mix in different formats and have a little contest for who gets to pick lunch. Remember to make the training fun and valuable.

12:00 PM Lunch

1:00 PM

- Work from the training manual on getting reference pics. Tell them the step-by-step method to make sure that they can start building their list.
- Role-play getting the picture with them with you being the customer.

2:00 PM End

Field Work:

- The goal tonight is to have a contest on how many reference pics we can get before the end of the day. Break the group up into teams. If the group is an odd number the sales manager can be on one team. Make sure the sales manager is with the top trainee if that becomes the case. Put out a gift card or spiff for the team that hits the most references. If the manager is on a team, they must get a one reference handicap.

HOMEWORK: Re-complete how to get reference pics lesson. Would be good for them to do BEFORE they go out.

Friday – W2

9:00 AM

*** Have measurements pulled up on screen so that they can understand how to price. ****

- Have each person pull up a price layout on their computer.
- Explain the items on the price list.
- Teach this right out of the training manual.
- Explain the purpose of Step 3.

10:45 AM Break

11:00 AM Sales Meeting

12:00 PM Lunch

1:00 PM

- Introduce Step 7
- Make sure they notate the question so that they can study and get it down perfectly.
- They should just be reading this at this point to make sure they aren't practicing one of our word for word questions the wrong way. We don't want to have to break down the repetition of the muscle memory they develop during study time.

2:30 PM Break

2:45 PM

- Introduce Step 8.
- During this block, you are teaching how to read the price layout and ask the closing question.
- They don't have to have it memorized today, but they need to at least be able to read it properly so that they can practice on their own.
- Make sure that the price layout is perfect before breaking.

4:00 PM Break

Field Work:

- With a super long training day we are not going to have actual field time. The trainees should go home and record their transitions questions, 3G's, figure a price and perform Steps 4-6 on a continuous video. Manager must give them measurements in order for them to price the job.
- Also have to get ready to go out and work in the field on Saturday

HOMEWORK: Re-complete all of Semester 1 and through semester 2 getting reference pics.

Monday – W3

9:00 AM

- Have them play the recordings and vote on the contest. Stop after each one and let them know what they did well and what they could have done better. Have them critique each other to make sure they can all see the mistakes as well.
- If not completed to a level of proficiency, the manager should consider termination.

9:50 AM Break

10:00 AM

- This block is to introduce and work on the WOL.
- We intentionally do not teach any objections other than the price at this point. Having only one option in the close keeps it simple for them and allows them to focus on improving what is most important: everything before Step 7. We have used this method for years and almost every decent rep has come out of training closing over 50%.
- Having these steps memorized during this training block is not important. The focus needs to be on how to go down the WOL even if they are reading it.

11:00 AM Sales Meeting

12:00 PM Break for Lunch

1:00 PM

- This block is all about progressions.
- Introduce the progressions using the three-step drop sheet from the university. This will help the rep to understand what we are trying to do in the WOL.
- Do not make them go past RECOGNIZING the progression. No performance at this time.

2:30 PM Break for the day

Field Work:

- Field time with the manager or an existing rep. Goal is to do everything on one of their own appointments through Step 6 with supervision. Manager or veteran rep to take over at the Pre-Close.

HOMEWORK: Complete RWU Insurance Courses through the Walk of Life Lesson

Tuesday – W3

9:00 AM

- This block is to introduce REACT. This is essential to helping reps deal with price objections after the close. We need to explain to our reps step-by-step what we are doing. You need to make sure that you, the manager, have gone through all the RWU classes on REACT again prior to doing this block.
- They need to write out the REACT for each progression. This is essential as they need to be READING the scripts for this block and we need to make sure that they have accurate notes to study tonight.

10:30 AM BREAK

10:45 AM

- This block is all about role-play and performance. We need the reps to be able to start at a price objection and recognize the objection and then be able to read the right REACT progression to be able to ask for the order again.
- You must do at least 2 different types of role-play during this 75-minute session.

12:00 PM Lunch on their own

1:00 PM

- Go through Pre-Close, Price Layout, WOL, and REACT in a role-play with them reading off the paper. The goal of this block is to get repetition in. Must be conducted perfectly to enable good habits to be formed.

2:30 PM Break for the day

Field Work:

- Again, field time with the manager or an existing rep. Goal is to do everything on one of their own appointments through Step 7 with supervision. Manager or veteran rep to take over at the close this time.

HOMEWORK: Complete through REACT Lesson on the Retail University.

Wednesday – W3

9:00 AM

- Role play on REACT. Reps need to know how to go through the REACT when given a progression without looking at the paper. At this point in the training, not practicing before the meeting is not tolerated.
- Make sure you bounce around between reps to make sure that the group stays involved in the training.

10:30 AM Break

11:00 AM Sales Meeting

12:00 PM Lunch on their own

1:00 PM

**** Must have measurements and how the jobs were sold for multiple jobs in order for them to practice. You also must have copies of paperwork for role play of Step 9. Also, must have a couple jobs for them to take home to practice writing paperwork. ****

- This block should be entirely focused on paperwork.
- Have them do timed sessions on each paperwork. Paperwork should take no more than 15 minutes to fill out.
- Two blocks of training: 30 minutes to teach Step 9, plus 15 minute role-play, then a 15 minute review of the role-play.

2:00 PM Break

2:15 PM

- Teach them the "give them your word" process to getting paperwork signed. We need to make sure to practice this until we get it right. Can break as soon as the reps get it. May take less than 45 minutes.

3:00 PM Break for the day

Field Work:

- Field time will be for them to be able to perform an entire presentation with supervision from manager or veteran rep.

HOMEWORK: Complete through all of Semester 2 of Insurance School

Thursday – W3

9:00 AM

- Review demos from last night to find wins and losses that we had. Make sure to make a big deal about the wins and understand some of the losses. We must keep the attitudes positive to ensure that we keep momentum going forward.

10:00 AM Break

10:15 AM

- Review the entire process from start to Step 9. Make sure you give them quiz questions in a round-robin style to see their level of knowledge. This is a very important block as they are in their final test tomorrow morning. Identify problem areas to assign RWU lessons to have individuals do tonight before their mock demo in the morning.

11:45 AM Break for lunch on their own

12:45 PM

- This block is all about Step 10. We need to make sure not to forget the importance of this step. After 3 weeks of training, you may be starting to wear out. Make sure to give each block the energy it deserves.
- Role play the Post-Close question until they get it right. This block may not take the entire time, but it is important that they get it right before ending for the day.

2:00 PM Break for day

Field Work:

- Study time to prepare for Mock Demo in the morning.

HOMEWORK: Complete RWU Insurance Courses assigned by manager during morning review session.

Friday – W3

****Must set up an Airbnb or house for the mock demos. Multiple houses are a better option for a big group of trainees. People running the mock demos must be equipped with GoPro cameras with multiple batteries to record the entire demo for each rep. ****

9:00 AM

- Today each trainee needs to complete one full mock demo. Complete all 10 steps in full role-play, no short cuts.
- If there are too many trainees for you to have time to grade individually, then have the veterans help in lieu of the sales meeting. Make sure that the Sales Manager takes good notes throughout the whole demo for you to review later.
- Whether the Sales Manager or the veteran rep is doing the evaluation, the whole thing should be recorded with a GoPro.
- A Ride-A-Long sheet should be completed for each mock demo.
- It is expected that there will be deficiencies, the purpose of today is to determine what areas need to be focused on next week.

11:00 AM Sales Meeting

12:00 PM Lunch

1:00 PM

- This block should only be used if there were mock demos that weren't completed before the sales meeting and need to be finished.
- Make sure that you get all the recordings of the mock demos and save them to the cloud. We need them for future meetings and trainings.

- Pair the trainees up to run leads together, and do not have them run solo until after their first sale as a team.

This will conclude our formal basic training, but our RELENTLESS pursuit of perfection will NEVER end.

#TTS #BITW

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