RODNEY WEBB UNIVERSITY

New Hire Retail 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

- 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 Catered 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

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

Tuesday – W1

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

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. Remember, they are learning about this industry, and these products and concepts may be unfamiliar. Take your time and teach them the industry terms.
- Demonstrate kill products specific to your industry in this block as well. This will help the trainees better understand the industry and help develop their expertise.
- Begin role-play by having them pitch kill products. Go through each product

individually and have each trainee role-play pitching each product.

10:30 AM Break

10:45 AM

- Continue to role-play through the product demo step by step. Have each rep pitch each component, product, or feature. 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.
- 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.

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.
- If there is not a demo for each trainee to attend, have them continue to role-play and practice at the office

HOMEWORK: Complete through the product demo on the Retail University. Practice presentation.

Wednesday – W1

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

1:00 PM

- Explain SEOCS
- 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 begin to show them how to set themselves up as the expert - we will get into this further tomorrow when we take them outside for Inspection training

2:00 PM

- Begin the block by explaining why selling the reference list is important.
- Introduce the 3G's.
- Demonstrate how to perform the 3G's and spend the remainder of the block having each of them role-play 3G's.

3:00 PM

- Role-play getting reference pics from the customer

3:30 PM Break for the day

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.

Thursday – W1

9:00 AM

**** Before this training starts you need to have a work area set up for an inspection specific to your industry. ****

- Go over the scores from the contest the day before. Celebrate the successes and make a big deal out of anyone who was able to complete an entire reference page or more. Remind them that acquiring references will be an ongoing pursuit for the rest of their careers, and that they will need multiple pages before they can run appointments on their own.

- The rest of the block should be used to go over industry-specific safety and inspection protocols, including any special tools that may be REQUIRED to complete an inspection.

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 an inspection. Use photographs from previous inspections, or from the internet, to demonstrate the types of problems they will be looking to expose and analyze in their inspections.

10:50 AM Break

11:00 AM

- Teach Digital Analysis outline. Go over Rules of the Digital Analysis, as well as Tools they should use to create urgency and demonstrate expertise. Demonstrate how to use the various tools, and encourage them to invest in their own success by growing their tool kit as they begin to make money.

12:00 PM Lunch

1:00 PM

- Take them to the inspection area and have each trainee shoot a Digital Analysis. Use a timer to keep them on track. Have them focus on getting comfortable with the timing and terminology.

- After the first round, review all videos and offer feedback and criticism on each.

- For the remainder of the block have them shoot multiple DAs, time permitting, to get more repetitions. Manager should observe and offer coaching.
- On the second round of videos, encourage them to begin to incorporate the technology tools you demonstrated this morning.
- Review second round of videos. Spend some time coaching them on how to transfer the video to their device in order to show it in the demo.

3:00 PM Break

3:15 PM

**** 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 2 hours on working on videos, 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.
- They each need to set up their company email account on their phones and you need to give them instructions on the following:
    - Viewing appointments on their calendar and the CRM
    - Uploading Digital Analysis and photos
    - Resulting Leads with correct dispositions

4:00 PM Break for the Day

Field Work:

- Perform practice Digital Analysis on a demo with a veteran rep or the manager. If the DA is good, it can be used for the demo; if not, the veteran rep or manager should shoot a second DA to coach the trainee and use for the demo.

HOMEWORK: Complete all Retail University Lessons related to Digital Analysis

Friday – W1

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:

- No demo tonight. The trainees should go home and record their transitions questions, 3G's, figure a price, and perform Steps 4 through 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 – W2

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:

- Demo with the manager or an existing rep. Goal is to do everything on the appointment through Step 6 with supervision. Manager or veteran rep to take over at the Pre-Close.

HOMEWORK: Complete Retail University Courses through the Walk of Life Lesson

Tuesday – W2

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, demo with the manager or an existing rep. Goal is to do everything on the appointment 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 – W2

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:

- Demo with manager or veteran rep. Goal will be for the trainee to be able to perform an entire presentation and close with supervision from manager or veteran rep.

HOMEWORK: Complete through all of Semester 2 of Retail University

Thursday – W2

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 Retail Courses assigned by manager during morning review session.

Friday – W2

****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