

CharTec 90-Day Salesperson Roadmap

In our over twenty years as an MSP, ARRC Technology, we've made many bad hiring decisions and many great ones. Through these decisions we've learned that best way to make successful employees is to lay groundwork for success using a roadmap. These roadmaps vary in length based on the position, but regardless provide opportunities for tremendous growth and learning, as well as opportunities for the individual to fail early if it's just not a fit.

The following is the roadmap we use for outside salespeople. Thus 90-day roadmap will produce individuals that are well versed in our company, our products and services, and are confident enough to make Managed Service sales.

Days 1-5

Attend a CharTec Academy within month one.

Locate and check out all books from the required reading list (see below) and expense any that need to be ordered.

Department Shadowing

- Day 1
 - Company tour and meet and greet – 1 hr
 - Shadow NOC and Help Desk departments – 1 hr
 - Shadow Break Fix and Front Counter departments – 1 hr
 - Shadow Warehouse/RMA departments – 1 hr
 - Shadow Builds and Quality Control departments – 2 hrs
 - End of day summary on departments
- Day 2
 - Onsite with the Technicians – 2 hrs
 - Onsite with the Cabling team – 2 hrs
 - CSR Shadowing – 1 hr
 - Shadow Account Management – 2 hrs
 - End of day summary
- Day 3
 - Shadow Accounting – Receivables – 1 hr
 - Shadow Sales Rep – 3 hrs
 - Shadow In-house and Onsite Project Management – 4 hrs
 - End of day summary
- Day 4
 - Shadow Operations – 2 hrs
 - ConnectWise overview
 - LabTech, Everest, and Quosal overviews
 - Receive all passwords and logins
 - End of day summary

- Day 5
 - Competitor Familiarization – 6 hrs
 - Identify Competition (Top 3 for each)
 - Managed Services
 - Telco
 - Cabling
 - Websites
 - Summary on each competitor. Include the following:
 - How long in business
 - What's their onsite hourly rate
 - What are they good at
 - Meeting With HR – 1 hr
 - Hand in summaries
 - Training experience
 - Complete HR survey
 - Meeting With CEO – 1 hr
 - Discussion on Experience
 - CEO Overview and questions on departments
 - Competitor Discussion

Day 6-10

Line of Business Application Study and Training

- ARRC Technology basics
 - Know all labor rates
 - Know all management leaders
 - Know all team leads
 - Know ARRC Technology's history
- View and pass necessary tests on ConnectWise videos
 - Demo "How to Create an Activity"
 - Demo "How to Create an Opportunity"
 - Demo "How to Look up a Client"
 - Demo "How to Look up an Agreement"
 - Demo "How to Look up Contact Info on a Client"
 - Demo "How to Add Notes in an Activity"
 - Demo "Use of the Sales Funnel"
 - Demo "How to Add a Client onto a Sales Track"
- View and pass necessary tests on Quosal videos
 - Complete demonstration on how to create, send, and look up sales quotes
- View and pass necessary tests on Everest Videos
 - Demo "How to Enter a New Client"
 - Demo "How to Create a Quote & Sales Order"
 - Demo "How to Look up a Client"

- Demo “How to Look up a Client’s Old Invoice”
- Demo “How Look up Client History”
- Demo “How to Look up Part Numbers, Price, and Availability on Products”
- Demo “How to Look up Past Quotes”
- Meeting With HR – 1 hr
 - Review test results
 - Complete training survey
- Meeting With CEO
 - Discussion on experience
 - Perform a demonstration on CW, Quosal and Everest based on videos

Days 11-30

Enhance Product Knowledge and Sales Presentations

- Demonstrate that you have a firm understanding of the following products (videos and recorded Webinars can be found on the CharTec site for most):
 - ARRC Full Managed Services offering
 - ARRC Lite Managed Services offering
 - Backup Disaster and Recovery Solution
 - RADAR
 - Reflexion SPAM Control
 - DISC
 - Visitor ID
 - Website Creation
- Watch and study the “A-C Sales Process” video and whitepaper
- Watch and summarize key take away points from “Academy Intro and Keynote” video by Alex Rogers
- Watch and summarize key take away points from “Sales Presentation Renovation” video by Alex Rogers
- Watch and summarize key take away points from “Don’t Spin Your Wheels, Ink the deal!”
- Watch and summarize key take away points from “Marketing Manager and Tracks”
- Watch all CharTec role play videos on the CharTec Connect site
 - All Bases Covered
 - Taking Initiative
 - Vendor Management
 - Professional Services
 - Security Management
 - Backup Disaster and Recovery
 - Proposal
 - Website Revenue Generation
 - Flat Rate IT Services
- Watch all Objection videos on the CharTec Connect site
 - Length of Agreement
 - Price
 - Let me think about it

- Owning Equipment
- Explaining the Network
- Meeting With HR – 1 hr
 - Turn in all video summaries and take away points
 - Turn in book summaries and papers
 - Complete training survey
- Meeting With CEO
 - Discussion on experience and summaries
 - Give an overview of both ARRC Managed Services Products
 - Be prepared to answer Objections
 - Perform a full demo on Visitor ID, Radar, and Address on the Fly
 - Explain the general concept of the BDR

Days 30-40

Attend a second CharTec Academy within the next 30 days

Study and Practice Discovery and Presentation

- Sales Discovery process
 - Demonstrate a firm understanding of all Discovery Questions
 - Create and personalize the presentation
 - Designing a proposal for Telco, Networking and Managed Services
 - Create a Visio diagram
- Study Managed Service offering presentation
 - Memorize slides and stories
 - Practice and roll play Managed Service presentation
- Meet with HR – 1 hr
 - Turn in sample presentation, proposal, and diagram
 - Complete training survey
- Meet with CEO on Managed Service presentation training – 2 hrs
 - Explain Discovery Process
 - Sales training with CEO
 - First roll play practice presentation to CEO

Days 41-50

Document Creation and Presentation Review

- Agreements
 - Create a Full Version Managed Service agreement
 - Study the agreement
 - Must be able to demonstrate a full understanding of the Managed Service agreement
 - Agreement objections
- Quarterly Business Reviews
 - Watch QBR roll play video on the CharTec Connect site
 - Understand the reasons for QBR

- Practice Manage Service presentations and understanding objections
 - Full Version of Managed Services
 - Lite Version of Managed Services
 - BDR
 - Website
- Meet with HR – 1 hr
 - Complete training survey
- Meet with CEO on Managed Service presentation training – 3 hrs
 - Demonstrate a full understanding of the agreement
 - Roll play the agreement
 - Roll play agreement objections
 - QBR discussion and explanation
 - Roll play and Sales Training
 - Question and answer time on Managed Services

Days 51-60

Onsite and In-House Sales Shadowing with All Members of the Sales Team

- Phone Systems, Cabling, and Video Conferencing Studying
 - Learn how to install and setup Skype
 - Mitel sales training
 - Cabling Infrastructure study guide
 - Learn the Mondo Pad
 - Research the benefits for dual screens
- Social Media
 - Setup or update Facebook profile
 - Setup or update LinkedIn profile
- Meeting with CEO
 - Present the following proposals
 - Mitel Phone System
 - Mondo Pad with demonstration
 - Sales training on presentations
 - Slide training
 - Role playing

Days 60 -75

Attend a third CharTec Academy within the next 30 days

Shadowing and Presentation Practice

- Sales shadowing and Account Management
 - Listen to Quality assurance Live Calls (2 Days)
 - Onsite QBR With Account management team
- Practice Managed Service Presentation
 - Present to the Officers

- Practice Telco Presentation
 - Present to the Officers
- Practice BDR Presentation
 - Present to the Officers
- Practice The Proposal For a Project and Managed Services
 - Present to the Officers

Days 76-90

Start of Sales Process and Final Review

- Enter all current prospects into ConnectWise
 - Create a Sales Track
 - Run a Sales Track
 - Setup 5-10 appointments with your current Prospects
 - Start the sales process
 - Create Activities and Opportunities
- Meet with CEO for final Road Map review
 - Funnel
 - Activity Points
 - Summary
 - Facebook
 - LinkedIn
 - Discuss the Prospects within the sales process
 - CEO will send out a letter to the client base announcing the new arrival to the team

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