Welcome to Building Outlet, where you're starting an exciting journey in sales! Here's an onboarding plan to help you hit the ground running and excel in your new role.

Here are the first steps to take on your new sales role journey!

Training Plan:

1. **Orientation:** Get acquainted with MBO's culture, values, and organizational structure. The first 4 sections of the playbook will help you understand these aspects of MBO. Understanding these aspects will help you to communicate our brand identity and values to clients effectively.

2. **Product Training**: Familiarize yourself with our range of metal building solutions, features, and benefits. Utilize resources such as YouTube channels, our project showcase, and past building plans to gain comprehensive knowledge about our offerings.

3. **Sales Process Training:** Learn our sales methodologies, CRM system (HubSpot), Panda Doc, qualifying leads, and closing deals. Watch: LEAD QUALIFICATION TRAINING VIDEO for best practices.

4. **Role-Specific Training:** Learn best practices of the Sales Call Training including Building Rapport, Making a Lead/ Prospect a referral, Product Presentation, Used Building call, Giving a Price, Objection, Leaving a message, Answering the call, Buyer Persona's and identifying the Journey.

5. **Shadowing Opportunities/Mentor:** Shadow experienced team members to observe sales calls, client meetings, and deal negotiations. Learning through observation and practical experience is invaluable in understanding real-world sales scenarios. Assign a mentor or buddy to help the new employee navigate their first few weeks on the job.

6. **Professional Development/Feedback**: 30, 60, and 90-day plans

Who to Meet With:

1. **Sales Manager:** Schedule a meeting with your sales manager to discuss your onboarding progress, goals, and any challenges you encounter. (Jeremy)

2. **Sales Team Members:** Connect with your fellow sales team members to build rapport, share insights, and collaborate on sales strategies.

3. **Other Team Members:** Meet with support staff, including marketing, customer service, and operations teams, to understand how they can assist you in achieving your sales objectives.

How to Structure Your Day:

SDRs

Morning Routine:

- Start the day by checking your email and CRM to ensure any urgent tasks or customer outreach are addressed promptly.
- Ensure all calls have been followed up and any additional forms are sent out for customers. Use templates in HubSpot for standardization and efficiency.
- Review LinkedIn activity to see who has viewed your profile or sent invites, and allocate time for individuals in MBO's target industries or engaging with previous customers. Track these customers through the preferred partner program

Focused Time:

- Set aside specific time each day to go through the open lead pool in the Contacts tab. Focus on unassigned deals and reach out to them via phone calls to make initial contact and qualify. Assign leads to yourself, this removes it from the open leads pool.
- Prioritize calling according to time zones, starting with regions in the East and progressively moving West throughout the day.
- Minimize interruptions during this prime calling time to maximize productivity and achieve KPIs.

Lunch: Be sure to rest and take a break. Get some movement in your body as well. It is highly beneficial to keep yourself focused and ready.

Afternoon Outreach:

- Allocate 1-2 hours for a combination of email outreach and follow-up calls, ensuring prompt responses to any inbound leads.
- Maintain a balance between email communication and active calling to engage leads in a personal manner.

End-of-Day Reporting:

- Conclude the day by logging all activities, including calls made, emails sent, responses received, and any encountered issues. Updating the CRM is crucial to
- Reflect on the day's successes and challenges to identify areas for improvement and celebrate achievements.

Collaboration and Feedback:

- If needed, connect with your sales manager or fellow SDRs to troubleshoot challenges and share insights from the day's interactions.
- Utilize team collaboration to brainstorm strategies for overcoming obstacles and optimizing performance.

Example SDR Time Blocked Day:
8AM - 10AM: Open Leads Pool Work
10AM - 12PM: Call Block #1
12PM - 1PM: Lunch
1PM - 4PM: Call Block #2, reply to emails
4PM - 5PM: Update CRM, Fill Out End of Day Report

1. Morning Routine: Start your day by reviewing your schedule, prioritizing tasks, and setting goals.
2. Client Meetings: Schedule client meetings strategically, ensuring they align with your sales objectives and customer needs.
3. Follow-Up: Dedicate time to follow up on leads, answer inquiries, and provide ongoing support to existing clients.
4. Documentation: Regularly update your CRM system with detailed notes from client interactions, ensuring accurate records and effective communication with the team.