### **Recruiting Funnel Process**

1. **Lead Generation**:
   * **Online Presence**: Utilizing social media, blogs, podcasts, and webinars to attract potential candidates.
   * **Referrals**: Encouraging existing team members to refer potential candidates.
   * **Recruiting Events**: Hosting or participating in sales and networking events to find new talent.
   * **Recruitment at Colleges**: Outside public speaking areas.
2. **Initial Contact**:
   * **Automated Emails**: Sending a series of emails to engage and inform potential hires about the company and the role.
   * **Webinars and Videos**: Providing informational content to give an overview of the company culture, expectations, and success stories.
3. **Screening and Interviews**:
   * **Application Review**: Evaluating resumes and application forms to shortlist candidates.
   * **Initial Interview**: Conducting a phone or video interview to assess the candidate’s communication skills and motivation.
   * **In-Person Interview**: A more in-depth interview to evaluate the candidate's fit for the role and company culture.

Flowchart for Hiring Process................

### [**Hudson Whitten**](mailto:hudson@coolroofs.co) **can you enter the flowchart here?**

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### **Onboarding Process**

1. **Pre-Training Preparation**:
   * **Documentation**: Completing necessary paperwork and contracts.
   * **Welcome Package**: Sending out a welcome kit with company merchandise, training materials, and a schedule.
   * **Request Email, Name, Number**: Request info from rep.
   * **Send 360 link**: Rep must complete 360 to continue
2. **Initial Training**:
   * **Orientation**: Introducing the company's history, mission, values, and team structure.
   * **Product Knowledge**: Providing detailed information about the products or services they will be selling.
   * **Sales Techniques**: Teaching the fundamental door-to-door sales techniques, including overcoming objections, closing sales, and building rapport.
   * **Introduction to Sam Taggart Training**: Lightspeed access.
   * **Role-Playing**: In office role playing, reviewing Sam Taggart D2D Training
3. **Field Training**:
   * **Shadowing**: Pairing new hires with experienced sales representatives to observe and learn in a real-world setting.
   * **Role-Playing**: Conducting role-playing exercises to practice sales pitches and handling customer objections.
   * **Initial Sales Goals**: Setting achievable sales goals to motivate new hires and provide a benchmark for success.
   * Review of Gamified System: Go over Gamified system in place for bench marks.
4. **Ongoing Support**:
   * **Mentorship**: Assigning a mentor or coach to provide continuous support and guidance.
   * **Regular Check-Ins**: Scheduling regular meetings to review progress, address challenges, and provide feedback.
   * **Advanced Training**: Offering additional training sessions to help new hires improve their skills and advance in their careers.
   * Gamifying system
5. **Performance Evaluation**:
   * **Metrics and KPIs**: Tracking performance against key performance indicators and sales targets. Review daily benchmarks in a gamified system.
   * **Feedback and Reviews**: Providing constructive feedback and conducting performance reviews to identify areas for improvement and recognize achievements.
6. **Career Development**:
   * **Growth Opportunities**: Identifying and promoting opportunities for career advancement within the company.
   * **Continuous Learning**: Encouraging participation in ongoing training programs and professional development activities.

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**Additional Breakdown of Day-to-Day for New Hire**

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### **Onboarding and Training Plan for D2D Sales Representatives**

This plan outlines the onboarding and training process for new D2D (Door-to-Door) sales representatives over the first 90 days, including benchmarks for success and funnel structure.

### **First 14 Days: Orientation and Initial Training**

#### **Objectives:**

* Introduce the company, culture, and team.
* Provide basic product knowledge and initial sales training.
* Start field shadowing.

#### **Activities:**

1. **Day 1-2: Company Orientation**
   * Welcome session and company overview.
   * Introduction to mission, values, and organizational structure.
   * Complete necessary paperwork and setup (360 Access). 2 1/2 Hour process
   * After completion of 360, email and CRM access granted
2. **Day 3-5: Product and Service Training**
   * Detailed training on products/services being sold. Google Classroom
   * 1 Hour Zoom Call with Sales Process
   * Q&A sessions with product managers or experienced reps.
   * Interactive demonstrations and hands-on practice.
   * Training through 360 and additional training through video recommendations
3. **Day 6-8: Sales Technique Training**
   * Introduction to D2D sales techniques and strategies.
   * Role-playing exercises to practice pitches and objection handling.
   * Training on the sales funnel, CRM, hail mapping, and lead tracking
4. **Day 9-14: Field Shadowing and Practice**
   * Pair new hires with experienced sales reps for shadowing. Or work with a Sales manager.
   * Initial practice in the field under supervision. Sales markers through gamifying score cards.
   * Daily debriefs to discuss experiences and learnings.
   * Afternoon standups prior to entering the field and daily debriefs

#### **Benchmarks for Success:**

* Complete all orientation sessions and training modules.
* Demonstrate basic understanding of products and sales techniques.
* Successfully shadow experienced reps and participate in field activities.
* Adding two contacts and inspections to CRM

..................................................................................................... STOP 7-10-2024

### **Days 15-30: Building Skills and Confidence**

#### **Objectives:**

* Strengthen product knowledge and sales skills.
* Begin independent fieldwork with support.
* Set initial sales targets.
* Minimum of 2 leads to pipeline per week.
* Goal over sales goals to start the week.
* Review of past two weeks.
* Attending sales meetings.

#### **Activities:**

1. **Day 15-20: Advanced Product and Sales Training**
   * In-depth training on advanced product features and benefits.
   * Advanced sales techniques and closing strategies.
   * Handling difficult objections and customer concerns.
   * Goal of 2 deals added a week minimum to pipeline.
   * Feed back on Gamified system.
   * Continue to role play and review work with Sam Taggart Training.
2. **Day 21-25: Independent Fieldwork with Support**
   * Begin independent door-to-door sales activities. Or Continue to work with Team and Sales Manager.
   * Regular check-ins with mentors for feedback and support. Review of Goals and Benchmarks.
   * Continue role-playing and skill-building exercises.
3. **Day 26-30: Performance Review and Adjustment**
   * Review performance against initial sales targets.
   * Identify areas for improvement and adjust strategies.
   * Ongoing training sessions based on observed needs.

#### **Benchmarks for Success:**

* Achieve initial sales targets set for this period.
* Demonstrate improved confidence and competence in the field.
* Receive positive feedback from mentors and supervisors.

-------------------------------------------------------------------------- Done 8-1-2024

### **Days 31-60: Increasing Independence and Productivity**

#### **Objectives:**

* Increase independence in sales activities.
* Focus on productivity and efficiency.
* Meet or exceed sales targets.
* Attending sales meetings

#### **Activities:**

1. **Day 31-40: Focused Fieldwork**
   * Continue independent sales activities with less frequent check-ins.
   * Implement feedback from previous performance reviews.
   * Focus on efficiency and time management.
2. **Day 41-50: Mid-Point Review and Training**
   * Mid-point performance review with detailed feedback.
   * Additional training sessions based on performance data.
   * Introduction to advanced sales techniques and upselling.
3. **Day 51-60: Intensive Sales Push**
   * Intensive focus on meeting or exceeding sales targets.
   * Daily goal setting and performance tracking.
   * Continued support and mentoring as needed.

#### **Benchmarks for Success:**

* Consistently meet or exceed sales targets.
* Demonstrate efficiency in managing time and leads.
* Show significant improvement in closing rates and customer interactions.

-------------------------------------------------------------------------- Done 8-1-2024

### **Days 61-90: Mastery and Leadership**

#### **Objectives:**

* Achieve mastery in sales techniques and product knowledge.
* Prepare for potential leadership or mentorship roles.
* Solidify position as a top performer.

#### **Activities:**

1. **Day 61-70: Mastery Training**
   * Advanced sales training and mastery of techniques.
   * Deep dives into complex sales scenarios and solutions.
   * Leadership and mentorship training for high performers.
2. **Day 71-80: Consistent High Performance**
   * Focus on maintaining high sales performance.
   * Begin mentoring newer reps as appropriate.
   * Regular performance reviews and goal adjustments.
3. **Day 81-90: Final Review and Next Steps**
   * Comprehensive performance review and feedback session.
   * Set long-term career goals and development plans.
   * Recognition of achievements and discussion of next steps.

#### **Benchmarks for Success:**

* Achieve mastery in sales and product knowledge.
* Consistently be a top performer in sales metrics.
* Demonstrate leadership potential and begin mentoring others.

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### **Sales Funnel Structure**

#### **1. Lead Generation**

* Initial Contact: Collect leads through various channels (referrals, events, online inquiries).
* Qualification: Qualify leads based on interest and potential.
* Upload to CRM: Build contact and job in job numbis, ready for company cam and inspection

#### **2. Prospecting**

* Door Knocking: Initial contact with potential customers.
* Engagement: Engage with prospects, introduce products, and gauge interest.
* Cold Calling: Use dial system
* Stop Ins: Visit local agents, management companies, and realtors.
* Group Links: Register with nextdoor, HOA groups, BMI groups, and Social media groups.

#### **3. Presentation**

* Product Demo: Demonstrate product benefits and features.
* Address Objections: Handle any concerns or objections raised by prospects.
* Role Playing: Role play in office, review video content, practice pitches.
* Product Details: Review manufacturer details and specifications.
* Understand Roofing Process: Review the full process of roofing from start to finish.
* Insurance Understanding: Review insurance process, review SOW, or proof of loss.
* Estimate Process: Fluid understanding of CRM and creating an estimate.

#### **4. Closing**

* Negotiation: Discuss terms, pricing, and finalize details.
* Closing Sale: Secure commitment and close the sale.

#### **5. Follow-Up**

* Post-Sale Support: Provide after-sales support and ensure customer satisfaction.
* Referrals: Encourage satisfied customers to refer new leads.

By following this structured onboarding and training plan, and tracking progress against specific benchmarks, D2D Experts can ensure that new hires are well-prepared, motivated, and capable of achieving success in their roles.

------------------------------------------------------------------------------------------------------------------ Done 7-24-2024

### **Gamification Elements**

1. **Points and Levels**:
   * **Points System**: Assign points for various activities such as knocking on doors, making presentations, closing sales, and attending training sessions.
   * **Levels and Ranks**: Create a tiered level system where sales reps can progress from novice to expert based on their accumulated points. Each level can have specific titles (e.g., Bronze, Silver, Gold, Platinum).
2. **Badges and Achievements**:
   * **Milestones**: Award badges for achieving specific milestones (e.g., 100 doors knocked, first sale, highest sales in a month).
   * **Skill Badges**: Provide badges for mastering specific skills such as product knowledge, overcoming objections, and customer relationship management.
3. **Leaderboards**:
   * **Daily/Weekly/Monthly Leaderboards**: Display top performers based on various metrics like number of sales, revenue generated, and customer satisfaction scores.
   * **Team Leaderboards**: Encourage healthy competition between different teams or regions.
4. **Challenges and Quests**:
   * **Daily Challenges**: Set short-term goals such as making a certain number of presentations or achieving a specific sales target in a day.
   * **Quests**: Create longer-term goals that require completing a series of tasks, offering larger rewards upon completion.
5. **Rewards and Incentives**:
   * **Tangible Rewards**: Offer physical rewards such as gift cards, gadgets, or travel opportunities for achieving certain milestones.
   * **Non-Tangible Rewards**: Provide incentives like extra vacation days, exclusive training sessions, or public recognition within the company.

### **Implementation Steps...... Work on Today with Today**

1. **Design the Gamification Framework**:
   * Identify key performance indicators (KPIs) that align with company goals.
   * Determine the point system and how activities will be rewarded.
   * Design levels, badges, and leaderboards.
2. **Integrate Technology**:
   * **Mobile App**: Develop or use an existing mobile app where sales reps can track their progress, view leaderboards, and receive notifications about challenges.
   * **CRM Integration**: Integrate the gamification system with the company’s CRM to automatically update points and achievements based on sales data.
3. **Launch and Onboard**:
   * **Training Sessions**: Conduct training sessions to introduce the gamification system to the sales team, explaining how it works and how they can benefit.
   * **Initial Challenges**: Launch with a few exciting challenges to get the team engaged from the start.
4. **Monitor and Adjust**:
   * **Feedback Mechanism**: Establish a system for receiving feedback from sales reps about the gamification process.
   * **Data Analysis**: Regularly analyze data to ensure the system is motivating desired behaviors and adjust point allocations, challenges, or rewards as necessary.

### **Example Gamification Plan....... Work on with Trey**

#### **Points System**

* **Knocking on Doors**: .5 point per door
* **Making Presentations**: 5 points per presentation
* **Closing Sales**: 20 points per sale
* **Attending Training**: 10 points per session

#### **Levels**

* **Bronze**: 0-500 points
* **Silver**: 501-1000 points
* **Gold**: 1001-2000 points
* **Platinum**: 2001+ points

#### **Badges**

* **First Sale Badge**: For closing the first sale
* **100 Doors Badge**: For knocking on 100 doors
* **Top Salesperson of the Month**: For the highest sales in a month

#### **Leaderboards**

* **Daily Leaderboard**: Top performers of the day
* **Monthly Leaderboard**: Top performers of the month
* **Team Leaderboard**: Best performing teams

#### **Challenges**

* **Daily Challenge**: Knock on 50 doors today
* **Weekly Quest**: Close 10 sales this week

#### **Rewards**

* **Monthly Top Performer**: $100 gift card
* **Level-Up Rewards**: Bronze to Silver – company merchandise; Silver to Gold – extra vacation day; Gold to Platinum – weekend getaway trip

----------------------------------------------------------------------------------------------------- STOP 7-10-2024

**Calendar and Bench Marks for Gaming D2D Experts ...... We Can Breakdown Sam's Calendar on Notes and Use**

**?????? Paid training $500.00 to $600.00 a week for the first 2 to 3 weeks possibly 4...... Track all data and let go of personal/ off board or remove to commission based on pipeline filling out.**

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### **Day-to-Day Calendar for D2D Sales Rep with Gamified Points System**

This day-to-day calendar outlines the activities for a D2D sales rep over the first 30 days. It includes daily benchmarks and a gamified points system to enhance motivation and engagement.

Week 1: Orientation and Basic Training

#### **Day 1: Orientation**

* **Morning**: Company Overview, Mission, Values (0 points)
* **Afternoon**: Meet the Team, Office Tour (0 points)
* **Benchmark**: Complete all orientation activities.

#### **Day 2: Product Training**

* **Morning**: Product Overview, Features, and Benefits (10 points)
* **Afternoon**: Interactive Product Demos, Q&A (10 points)
* **Benchmark**: Understand basic product knowledge.

#### **Day 3: Basic Sales Training**

* **Morning**: Introduction to D2D Sales Techniques (10 points)
* **Afternoon**: Role-Playing Exercises (15 points)
* **Benchmark**: Demonstrate basic sales pitch.

#### **Day 4: Sales Funnel and CRM Training**

* **Morning**: Understanding the Sales Funnel (10 points)
* **Afternoon**: CRM Setup and Training (10 points)
* **Benchmark**: Successfully set up and navigate CRM.

#### **Day 5: Shadowing and Field Introduction**

* **Morning**: Shadow Experienced Rep (20 points)
* **Afternoon**: Debrief and Q&A Session (10 points)
* **Benchmark**: Complete shadowing and discuss learnings.

#### **Day 6: Field Practice**

* **Morning**: Door Knocking Practice with Mentor (15 points)
* **Afternoon**: Feedback Session (10 points)
* **Benchmark**: Knock on at least 20 doors with mentor.

#### **Day 7: Review and Planning**

* **Morning**: Week Review, Q&A (0 points)
* **Afternoon**: Plan Next Week’s Activities (0 points)
* **Benchmark**: Complete weekly review and plan.

### **Week 2: Independent Fieldwork and Skill Building**

#### **Day 8: Independent Fieldwork**

* **Morning**: Door Knocking (1 point per door)
* **Afternoon**: Door Knocking (1 point per door)
* **Benchmark**: Knock on at least 40 doors (40 points).

#### **Day 9: Sales Pitches**

* **Morning**: Delivering Sales Pitches (5 points per pitch)
* **Afternoon**: Delivering Sales Pitches (5 points per pitch)
* **Benchmark**: Deliver at least 10 pitches (50 points).

#### **Day 10: Handling Objections**

* **Morning**: Role-Playing Objection Handling (15 points)
* **Afternoon**: Field Practice with Mentor (10 points)
* **Benchmark**: Successfully handle 5 objections in the field.

#### **Day 11: Closing Techniques**

* **Morning**: Training on Closing Techniques (10 points)
* **Afternoon**: Practice Closing in Field (5 points per attempt)
* **Benchmark**: Attempt at least 5 closes (25 points).

#### **Day 12: Review and Adjust**

* **Morning**: Performance Review (0 points)
* **Afternoon**: Adjust Sales Strategies (0 points)
* **Benchmark**: Complete review and adjust strategies.

#### **Day 13: Intensive Fieldwork**

* **Morning**: Door Knocking and Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Door Knocking and Pitches (1 point per door, 5 points per pitch)
* **Benchmark**: Knock on at least 40 doors and deliver 10 pitches (90 points).

#### **Day 14: Team Building and Training**

* **Morning**: Team Building Activities (0 points)
* **Afternoon**: Advanced Sales Training (10 points)
* **Benchmark**: Participate in all activities.

### **Week 3: Focused Sales and Goal Setting**

#### **Day 15: Goal Setting and Planning**

* **Morning**: Set Weekly Goals (0 points)
* **Afternoon**: Plan Field Activities (0 points)
* **Benchmark**: Set clear goals and detailed plan.

#### **Day 16: Fieldwork and Feedback**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Feedback Session with Mentor (10 points)
* **Benchmark**: Knock on at least 40 doors and deliver 10 pitches (90 points).

#### **Day 17: Advanced Techniques**

* **Morning**: Training on Advanced Sales Techniques (10 points)
* **Afternoon**: Field Practice (5 points per attempt)
* **Benchmark**: Attempt at least 5 advanced techniques (25 points).

#### **Day 18: Customer Relationship Management**

* **Morning**: Training on Building Customer Relationships (10 points)
* **Afternoon**: Practice in Field (5 points per customer interaction)
* **Benchmark**: Engage with at least 5 customers (25 points).

#### **Day 19: Performance Review**

* **Morning**: Mid-Week Performance Review (0 points)
* **Afternoon**: Adjust Strategies Based on Feedback (0 points)
* **Benchmark**: Complete review and adjust strategies.

#### **Day 20: Intensive Fieldwork**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Benchmark**: Knock on at least 50 doors and deliver 15 pitches (125 points).

#### **Day 21: Review and Rest**

* **Morning**: Weekly Review, Q&A (0 points)
* **Afternoon**: Rest and Plan Next Week (0 points)
* **Benchmark**: Complete weekly review and plan.

### **Week 4: Mastery and Consistency**

#### **Day 22: Goal Setting and Planning**

* **Morning**: Set Weekly Goals (0 points)
* **Afternoon**: Plan Field Activities (0 points)
* **Benchmark**: Set clear goals and detailed plan.

#### **Day 23: Fieldwork and Mastery**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Mastery Practice (10 points)
* **Benchmark**: Knock on at least 50 doors and deliver 15 pitches (125 points).

#### **Day 24: Leadership Training**

* **Morning**: Training on Leadership Skills (10 points)
* **Afternoon**: Mentor New Reps (5 points per session)
* **Benchmark**: Mentor at least 2 new reps (20 points).

#### **Day 25: Advanced Sales Push**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Benchmark**: Knock on at least 60 doors and deliver 20 pitches (160 points).

#### **Day 26: Performance Review and Adjustment**

* **Morning**: Mid-Week Performance Review (0 points)
* **Afternoon**: Adjust Strategies Based on Feedback (0 points)
* **Benchmark**: Complete review and adjust strategies.

#### **Day 27: Intensive Fieldwork**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Benchmark**: Knock on at least 60 doors and deliver 20 pitches (160 points).

#### **Day 28: Team Building and Advanced Training**

* **Morning**: Team Building Activities (0 points)
* **Afternoon**: Advanced Sales Training (10 points)
* **Benchmark**: Participate in all activities.

#### **Day 29: Fieldwork and Goal Achievement**

* **Morning**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Afternoon**: Door Knocking and Sales Pitches (1 point per door, 5 points per pitch)
* **Benchmark**: Knock on at least 60 doors and deliver 20 pitches (160 points).

#### **Day 30: Final Review and Celebration**

* **Morning**: Final Performance Review (0 points)
* **Afternoon**: Celebrate Achievements and Plan Next Steps (0 points)
* **Benchmark**: Complete review and celebrate achievements.

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### **Points System Overview**

#### **Daily Activities and Points**

* **Door Knocking**: 1 point per door.
* **Sales Pitches**: 5 points per pitch.
* **Role-Playing/Practice Sessions**: 10-15 points per session.
* **Mentorship**: 5 points per mentoring session.
* **Training Sessions**: 10 points per session.

#### **Weekly Goals and Benchmarks**

* **Week 1**: Complete orientation and basic training (0-100 points).
* **Week 2**: Knock on at least 200 doors, and deliver at least 50 pitches (500 points).
* **Week 3**: Knock on at least 250 doors, and deliver at least 60 pitches (650 points).
* **Week 4**: Knock on at least 270 doors, and deliver at least 70 pitches (740 points).

### **Incentives and Rewards**

#### **Weekly Rewards**

* **Top Performer**: Gift card or small prize for the highest points.
* **Milestone Achievements**: Special recognition for meeting benchmarks.

#### **Monthly Rewards**

* **Consistent High Performer**: Larger reward such as a bonus or additional time off.
* **Leadership and Mentorship**: Recognition for those who assist in training and mentoring new reps

--------------------------------------------------------------------------------------------------------------------------------------------------------------- START HERE ---------------------------------------------------------------------------------- Review Below with Trey

**Clear Defined Explanation of Sales Reps Responsibilities..................................... This will need to be changed based on the games.... Outline to Start and work on**

### **Clear Tasks for D2D Sales Reps to Ensure Success**

To ensure the success of D2D sales representatives, it's essential to outline clear, achievable tasks. Here’s a structured daily and weekly task list that integrates key activities and benchmarks.

### **Daily Tasks**

#### **1. 30-Minute Training with Sam Taggart**

* **Objective**: Improve sales skills and product knowledge.
* **Action**: Watch a training video or participate in a live training session led by Sam Taggart.
* **Benchmark**: Complete the training session and take notes for key takeaways.

#### **2. Knock 50 Doors**

* **Objective**: Increase the number of prospects.
* **Action**: Knock on at least 50 doors and engage with homeowners.
* **Benchmark**: Maintain a log of doors knocked and interactions.

#### **3. Set 2 Appointments / Roof Inspections**

* **Objective**: Generate potential leads for in-home meetings.
* **Action**: Aim to schedule at least 2 appointments or roof inspections.
* **Benchmark**: Confirm appointments in the CRM system.

#### **4. Post "Turfing" Pictures in Slack**

* **Objective**: Maintain accountability and share fieldwork.
* **Action**: Take and post pictures of daily activities or notable interactions in the team Slack channel.
* **Benchmark**: Post at least one picture daily.

### **Weekly Tasks**

#### **1. Attend 3 Sales Meetings**

* **Objective**: Stay updated on team progress and strategies.
* **Action**: Participate in 3 team sales meetings throughout the week.
* **Benchmark**: Engage in discussions and contribute insights during meetings.

#### **2. Conduct 8-10 In-Home Meetings / Roof Inspections**

* **Objective**: Convert prospects to customers through detailed inspections and presentations.
* **Action**: Hold 8-10 in-home meetings or roof inspections.
* **Benchmark**: Log all meetings in the CRM and follow up with potential customers.

### **Example Daily Schedule**

**Morning:**

1. **8:00 AM - 8:30 AM**: Training with Sam Taggart
   * Watch training video or join live session.
   * Take notes and write down any questions or actionable items.
2. **8:30 AM - 9:00 AM**: Plan and Review
   * Review previous day’s activities.
   * Plan the route and target areas for door knocking.

**Fieldwork:** 3. **9:00 AM - 12:00 PM**: Door Knocking

* Knock on at least 25 doors.
* Engage with prospects and try to set appointments.

**Lunch Break:** 4. **12:00 PM - 1:00 PM**: Lunch Break

**Afternoon:** 5. **1:00 PM - 4:00 PM**: Door Knocking and Appointments

* Knock on the remaining 25 doors.
* Conduct scheduled roof inspections or appointments.

1. **4:00 PM - 5:00 PM**: Follow-Up and Administration
   * Follow up with leads from the day.
   * Confirm appointments for the next day.
   * Update CRM with the day’s activities.

**Evening:** 7. **5:00 PM - 5:30 PM**: Slack Updates

* Post "tuffering" pictures in Slack.
* Review and respond to any team messages or updates.

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### **Weekly Review and Planning**

**Friday Afternoon:**

1. **Review Weekly Performance**: Assess progress towards weekly benchmarks (50 doors/day, 2 appointments/day, 8-10 in-home meetings/week).
2. **Participate in Sales Meeting**: Share successes and challenges, discuss strategies.
3. **Plan Next Week**: Set goals for the upcoming week, adjust strategies as needed.

### **Points System for Gamification**

#### **Daily Points:**

* **Training Completion**: 10 points
* **Door Knocking (50 doors)**: 50 points (1 point per door)
* **Appointments Set**: 20 points (10 points per appointment)
* **Slack Picture Post**: 10 points

#### **Weekly Points:**

* **Sales Meetings**: 15 points per meeting (45 points for 3 meetings)
* **In-Home Meetings / Roof Inspections**: 10 points each (80-100 points for 8-10 meetings)

### **Rewards and Incentives**

**Weekly Rewards**:

* Top performers receive a gift card or bonus points towards monthly rewards.

**Monthly Rewards**:

* High achievers earn larger rewards such as bonuses, time off, or recognition at team events.

By clearly outlining daily and weekly tasks, incorporating consistent training, and gamifying the process, D2D sales reps will have a structured path to success that keeps them motivated and accountable.

**---------------------------------------------------------------------------------------------------------------------**

**Mayor of your Area**

### **D2D Sales Mapping and Day-to-Day Home Knocking Strategy**

Mapping out a strategy for door-to-door sales targeting specific neighborhoods can help maximize efficiency and effectiveness. Here’s a detailed plan to map out your daily targets, along with some considerations for mapping homes in your area.

### **Steps to Create a D2D Sales Map**

1. **Identify Target Areas**: Use demographic data, local knowledge, and CRM insights to identify the best neighborhoods for door-to-door sales. Focus on areas with a high potential for sales based on income levels, homeowner status, and past success.
2. **Segment the Neighborhoods**: Break down larger neighborhoods into manageable sections that can be covered in a single day. Each section should include around 50 homes.
3. **Create a Daily Route Plan**: Plan a specific route for each day to ensure you cover all homes efficiently without backtracking. Use mapping tools like Google Maps, or specialized sales mapping software.
4. **Schedule Regular Reviews**: Regularly review and adjust your plan based on results, new information, and feedback from the field.

### **Tools and Resources for Mapping**

1. **Google Maps**: Use to visualize the neighborhood, plan routes, and estimate walking distances.
2. **Sales Mapping Software**: Tools like Badger Maps, Spotio, Sales Rabbit, and Map My Customers can provide advanced features for sales territory mapping and optimization.
3. **CRM Integration**: Ensure your CRM is updated with mapped areas and routes to track progress and follow up efficiently.......... **Yannick can help with this......**

### **Tips for Effective Door-to-Door Sales Mapping**

1. **Plan for Diversity**: Include a mix of different neighborhoods to avoid over-saturating one area.
2. **Account for Time of Day**: Some areas may be more receptive at different times of the day. Adjust your schedule accordingly.
3. **Use Data**: Leverage data from past sales to identify high-potential areas.
4. **Be Prepared**: Have all necessary materials ready (brochures, business cards, appointment sheets) and ensure you’re familiar with the area’s layout.

### **Example of a Day-to-Day D2D Sales Plan..................................... NEED TO CHANGE OUT TIMES......... THIS IS AN OUTLINE**

#### **Monday: Neighborhood A**

* **Section 1:**
  + **Morning (9:00 AM - 12:00 PM)**: Knock on doors along Main Street, Oak Avenue, and Elm Street.
  + **Afternoon (1:00 PM - 4:00 PM)**: Knock on doors along Maple Drive, Pine Street, and Birch Road.
  + **Benchmark**: Knock on 50 doors, aim to set 2 appointments.

#### **Tuesday: Neighborhood B**

* **Section 2:**
  + **Morning (9:00 AM - 12:00 PM)**: Knock on doors along Cedar Lane, Willow Avenue, and Spruce Street.
  + **Afternoon (1:00 PM - 4:00 PM)**: Knock on doors along Cherry Drive, Poplar Street, and Fir Road.
  + **Benchmark**: Knock on 50 doors, aim to set 2 appointments.

#### **Wednesday: Neighborhood C**

* **Section 3:**
  + **Morning (9:00 AM - 12:00 PM)**: Knock on doors along Ash Avenue, Sycamore Street, and Dogwood Lane.
  + **Afternoon (1:00 PM - 4:00 PM)**: Knock on doors along Cypress Drive, Redwood Street, and Juniper Road.
  + **Benchmark**: Knock on 50 doors, aim to set 2 appointments.

#### **Thursday: Neighborhood D**

* **Section 4:**
  + **Morning (9:00 AM - 12:00 PM)**: Knock on doors along Beech Avenue, Hickory Street, and Palm Lane.
  + **Afternoon (1:00 PM - 4:00 PM)**: Knock on doors along Alder Drive, Magnolia Street, and Laurel Road.
  + **Benchmark**: Knock on 50 doors, aim to set 2 appointments.

#### **Friday: Neighborhood E**

* **Section 5:**
  + **Morning (9:00 AM - 12:00 PM)**: Knock on doors along Walnut Avenue, Birch Street, and Holly Lane.
  + **Afternoon (1:00 PM - 4:00 PM)**: Knock on doors along Cedar Drive, Maple Street, and Pine Road.
  + **Benchmark**: Knock on 50 doors, aim to set 2 appointments.

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### **Daily Checklist for D2D Sales Reps**

1. **Morning Preparation (8:00 AM - 9:00 AM)**
   * Review daily route and plan.
   * Gather necessary materials and equipment.
   * Brief 30-minute training session with Sam Taggart.
2. **Morning Fieldwork (9:00 AM - 12:00 PM)**
   * Knock on doors as per the mapped route.
   * Engage with homeowners and attempt to set appointments.
   * Record interactions and notes in CRM.
3. **Lunch Break (12:00 PM - 1:00 PM)**
   * Take a break and review morning’s progress.
4. **Afternoon Fieldwork (1:00 PM - 4:00 PM)**
   * Continue knocking on doors as per the mapped route.
   * Engage with homeowners and attempt to set appointments.
   * Record interactions and notes in CRM.
5. **Follow-Up and Administration (4:00 PM - 5:00 PM)**
   * Follow up with leads from the day.
   * Confirm appointments for the next day.
   * Update CRM with the day’s activities.
6. **End of Day Review (5:00 PM - 5:30 PM)**
   * Post "tuffering" pictures in Slack.
   * Review and respond to team messages.
   * Reflect on the day’s successes and areas for improvement.

By following this structured approach, D2D sales reps can effectively cover their designated areas, track their progress, and achieve their sales goals.

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### **Gamified D2D Sales Mapping Strategy**

Incorporating gamification into your D2D sales mapping can enhance motivation and productivity among sales reps. Here's a detailed plan to map out daily targets, integrating gamified elements to boost engagement and performance.

### **Steps to Create a Gamified D2D Sales Map**

1. **Identify Target Areas**: Use demographic data, local knowledge, and CRM insights to identify the best neighborhoods for door-to-door sales.
2. **Segment the Neighborhoods**: Break down larger neighborhoods into manageable sections that can be covered in a single day.
3. **Create a Daily Route Plan**: Plan a specific route for each day using mapping tools like Google Maps, or specialized sales mapping software.
4. **Gamify the Process**: Introduce points, badges, and rewards to incentivize daily and weekly achievements.

### **Gamified Daily and Weekly Plan**

#### **Daily Tasks and Points System**

* **30-Minute Training with Sam Taggart**: 10 points
* **Knock on 50 Doors**: 1 point per door (50 points)
* **Set 2 Appointments / Roof Inspections**: 20 points (10 points per appointment)
* **Post "Tuffering" Pictures in Slack**: 10 points
* **Additional Engagements** (e.g., detailed conversations, follow-ups): 5 points each

#### **Weekly Tasks and Points System**

* **Attend 3 Sales Meetings**: 15 points per meeting (45 points)
* **Conduct 8-10 In-Home Meetings / Roof Inspections**: 10 points each (80-100 points)

### **Weekly Rewards**

* **Top Performer**: Gift card or small prize for the highest points.
* **Milestone Achievements**: Special recognition for meeting benchmarks.

### **Monthly Rewards**

* **Consistent High Performer**: Larger reward such as a bonus or additional time off.
* **Leadership and Mentorship**: Recognition for those who assist in training and mentoring new reps.

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### **Example of a Gamified Day-to-Day Plan**

#### **Monday: Neighborhood A (Section 1)**

* **Morning (9:00 AM - 12:00 PM)**: Knock on 25 doors along Main Street, Oak Avenue, and Elm Street.
  + Points: 25 points
* **Afternoon (1:00 PM - 4:00 PM)**: Knock on 25 doors along Maple Drive, Pine Street, and Birch Road.
  + Points: 25 points
* **Benchmark**: Knock on 50 doors (50 points), aim to set 2 appointments (20 points).
* **Evening (5:00 PM - 5:30 PM)**: Post "Tuffering" pictures in Slack (10 points).

#### **Tuesday: Neighborhood B (Section 2)**

* **Morning (9:00 AM - 12:00 PM)**: Knock on 25 doors along Cedar Lane, Willow Avenue, and Spruce Street.
  + Points: 25 points
* **Afternoon (1:00 PM - 4:00 PM)**: Knock on 25 doors along Cherry Drive, Poplar Street, and Fir Road.
  + Points: 25 points
* **Benchmark**: Knock on 50 doors (50 points), aim to set 2 appointments (20 points).
* **Evening (5:00 PM - 5:30 PM)**: Post "Tuffering" pictures in Slack (10 points).

#### **Wednesday: Neighborhood C (Section 3)**

* **Morning (9:00 AM - 12:00 PM)**: Knock on 25 doors along Ash Avenue, Sycamore Street, and Dogwood Lane.
  + Points: 25 points
* **Afternoon (1:00 PM - 4:00 PM)**: Knock on 25 doors along Cypress Drive, Redwood Street, and Juniper Road.
  + Points: 25 points
* **Benchmark**: Knock on 50 doors (50 points), aim to set 2 appointments (20 points).
* **Evening (5:00 PM - 5:30 PM)**: Post "Tuffering" pictures in Slack (10 points).

#### **Thursday: Neighborhood D (Section 4)**

* **Morning (9:00 AM - 12:00 PM)**: Knock on 25 doors along Beech Avenue, Hickory Street, and Palm Lane.
  + Points: 25 points
* **Afternoon (1:00 PM - 4:00 PM)**: Knock on 25 doors along Alder Drive, Magnolia Street, and Laurel Road.
  + Points: 25 points
* **Benchmark**: Knock on 50 doors (50 points), aim to set 2 appointments (20 points).
* **Evening (5:00 PM - 5:30 PM)**: Post "Tuffering" pictures in Slack (10 points).

#### **Friday: Neighborhood E (Section 5)**

* **Morning (9:00 AM - 12:00 PM)**: Knock on 25 doors along Walnut Avenue, Birch Street, and Holly Lane.
  + Points: 25 points
* **Afternoon (1:00 PM - 4:00 PM)**: Knock on 25 doors along Cedar Drive, Maple Street, and Pine Road.
  + Points: 25 points
* **Benchmark**: Knock on 50 doors (50 points), aim to set 2 appointments (20 points).
* **Evening (5:00 PM - 5:30 PM)**: Post "Turfing" pictures in Slack (10 points).

### **Total Weekly Points**

* **Daily Points**: 100 points/day (50 doors + 2 appointments + "Tuffering" picture) × 5 days = 500 points
* **Sales Meetings**: 45 points
* **In-Home Meetings / Roof Inspections**: 80-100 points
* **Total Weekly Points**: 625-645 points

### **Tools and Resources for Mapping**

1. **Google Maps**: To visualize neighborhoods and plan routes.
2. **Sales Mapping Software**: Tools like Badger Maps, Spotio, Sales Rabbit and Map My Customers for advanced features.
3. **CRM Integration**: To track progress and follow-up efficiently.

### **Tips for Effective D2D Sales Mapping**

1. **Plan for Diversity**: Include a mix of different neighborhoods to avoid over-saturating one area.
2. **Account for Time of Day**: Adjust your schedule according to when people are most likely to be home.
3. **Use Data**: Leverage data from past sales to identify high-potential areas.
4. **Be Prepared**: Ensure you have all necessary materials (brochures, business cards, appointment sheets).

By following this gamified and structured approach, D2D sales reps can effectively cover their designated areas, stay motivated, and achieve their sales goals.