

**Pre-Training Checklist**

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| **Tasks** | **Mgr Initials** | **Tasks** | **Mgr Initials** |
| **Local Online Advertising for Dummies** |  | **Exposure to Value Prop Demo** |  |
| Read Chapter 2 |  | Sit on a demo on Monday |  |
| Read Chapter 7 |  | Sit on a demo on Tuesday |  |
| Read Chapter 8 |  | Sit on a demo on Wednesday |  |
| Read Chapter 9 |  | Sit on a demo on Thursday |  |
| Read Chapter 5 |  | Sit on a demo on Friday |  |
| **SalesForce.Com Experience** |  | **Pre-Read Training Materials** |  |
| Know & Sign off on Rules of Engagement |  | Objection Handling Reference |  |
| Create & Edit a Lead |  | Budgeting |  |
| Create a Task & Event |  | Fees Handout |  |
| Create a list from Open Sales |  | Cold Calling |  |
| **Prospecting Fluency in 3 Sources** |  | Rules of Training |  |
| Find & Load 10 leads to SFDC from source 1 |  | **Mentorship Program** |  |
| Find & Load 10 leads to SFDC from source 2 |  | Assign Mentor |  |
| Find & Load 10 leads to SFDC from source 3 |  | Meet with Mentor |  |
| **Listen to Cold Calls** |  | **Using Yodle Live** |  |
| Sit w/ your Mentor as they Cold Call Monday |  | Yodle Live Account (Sponsored & Organic) |  |
| Sit w/ your Mentor as they Cold Call Tuesday |  | Using Yodle Live to find a demo account |  |
| Sit w/ your Mentor as they Cold Call Wednesday |  | **Manager Checkouts** |  |
| Sit w/ your Mentor as they Cold Call Thursday |  | Recite the Yodle elevator pitch |  |
| Sit w/ your Mentor as they Cold Call Friday |  | Complete Fees checkout sheet |  |
| **Make Cold Calls** |  |  |  |
| With mentor for 1 hr (switch on/off) |  | By COB on Thursday, checklist complete: |  |
| With manager for 1 hr (switch on/off) |  |  |  |
| **Segment Selection** |  | Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
| Email Brett your top 2 segments by Thursday |  |  |  |
|  |  | By COB on Friday, RVP debrief complete: |  |
|  |  |  |  |
|  |  | Recommend Live Training: YES / NO |  |