

Overview:

Day-by-day Sales Leader Pre-VSU experience overview on onboarding, shadowing, core systems training, facilitation prep, and Service Titan.

Monday:

1. 8:00 AM – 10:00 AM:

- Memorable Onboarding
 - *Team intro, Core Values, Cultural Alignment, HR Onboarding*

2. 10:00 AM – 12:00 PM:

- Shadow: Talent Acquisition
 - *Recruiting Flow, Candidate Funnel, Screening Tools, high-level Greenhouse review*

3. 12:00 PM – 1:00 PM:

- Lunch
 - *Welcome Lunch with possibly the team*

4. 1:00 PM – 3:00 PM:

- Shadow: Human Resources
 - *Hiring, Onboarding, Compliance*

5. 3:00 PM – 5:00 PM:

- Shadow: Marketing
 - *Brand Messaging, Campaigns, Local Awareness Strategy*

Tuesday:

1. 8:00 AM – 10:00 AM:

- Shadow: Call Center
 - *Live Monitoring + Scripts*

2. 10:00 AM – 11:00 AM:

- Call Center Policy Review
 - *BU Job Type & Lead Handling*

3. 11:00 AM – 12:00 PM:

- Shadow: Production & Install Support
 - *Meet and greet the production team and their roles*

4. 12:00 PM – 1:00 PM:

- Lunch

5. 1:00 PM – 5:00 PM:

- Shadow: Production & Install Support
 - *Work with each department to see the day in life*

Wednesday:

1. **8:00 AM – 9:30 AM:**
 - SM Framework Overview
 - *Structure, Roles, Leadership Cadence*
2. **9:30 AM – 11:00 AM:**
 - Monday.com Training
 - *Project Tracking + Accountability Boards*
3. **11:00 AM – 12:00 PM:**
 - Facilitation Foundations: Train-the-Trainer & Learning Flow
 - *Taxonomies*
4. **12:00 PM – 1:00 PM:**
 - Lunch
5. **1:00 PM – 3:00 PM:**
 - Goal Setting
 - *7 Fs + Why Page Reflection*
6. **3:00 PM – 5:00 PM:**
 - Sales Meeting Prep
 - *Slides, Talking Points, Logistics*

Thursday:

1. **8:00 AM – 9:00 AM:**
 - Observe Sales Meeting
 - *Help facilitate in certain spots*
2. **9:00 AM – 10:00 AM:**
 - Coaching Debrief
 - *Reflect meeting facilitation, messaging, and team engagement*
3. **10:00 AM – 12:00 PM:**
 - Train-the-Trainer:
 - *Running CE for New/Low-Performing RIs*
4. **12:00 PM – 1:00 PM:**
 - Lunch
5. **1:00 PM – 2:00 PM:**
 - Succession Planning
 - *Mentorship Pathways and Talent Mapping*
6. **2:00 PM – 5:00 PM:**
 - Service Titan Training Dispatch Board
 - *Lead assignment/reassignment, color coding, mapping, texting groups, board customization*

Friday:

1. **8:00 AM – 10:00 AM:**
 - Leadership Roundtable
 - *Reflect, Q&A, and Expectations for next week*
2. **10:00 AM – 12:00 PM:**
 - Service Titan Training: Schedule Adaptive Capacity
 - *Add/remove RIs, manage availability/capacity, 5-12 rule, daily board usage*
3. **12:00 PM – 1:00 PM:**
 - Lunch
4. **1:00 PM – 2:30 PM:**
 - Service Titan Training: Data Accuracy
 - *BU Job Type, contact center data entry, SM follow-up tabs like estimates waiting for review, incomplete jobs*
5. **3:00 PM – 5:00 PM:**
 - *Final Alignment + Week Reflection + Temperature Check*

WEEK 1 VSU

Monday:

1. **8:00 AM – 9:00 AM:**
 - Building Trust & Team Culture
 - *Embedding core behaviors and clarity*
2. **9:00 AM – 10:30 AM:**
 - Hiring
 - *Interviewing & Greenhouse Deep Dive*
3. **10:30 AM – 12:00 PM:**
 - Onboarding New Ris
 - *How to ensure readiness and cultural alignment*
4. **12:00 PM – 1:00 PM:**
 - Lunch
5. **1:00 PM – 2:00 PM:**
 - Capacity Management
 - *Forecasting and adjusting based on demand*
6. **2:00 PM – 5:00 PM:**
 - *Shadow a Sales Appointment*
 - *Go on an afternoon appointment*

Tuesday:

1. 8:00 AM – 9:30 AM:

- Rilla Analytics & Usage
 - *Listening time, usage patterns, performance metrics*

2. 9:30 AM – 11:00 AM:

- Rilla RI Portal & Library
 - *Brand-specific reference tools*

3. 11:00 AM – 12:00 PM:

- Rilla Test-Out with Rubric
 - *Evaluate RI readiness post-VSU*

4. 12:00 PM – 1:00 PM:

- Lunch

5. 1:00 PM – 2:00 PM:

- Performance Management Foundations
 - *Setting expectations & coaching workflows*

6. 2:00 PM – 3:00 PM:

- Recognition Systems
 - *How to reward and reinforce the right behaviors*

7. 3:00 PM to 5:00 PM

- *Set up for VSU*
 - *Set expectations, provide any materials, and get prepped!*