

Objective:

This SOP sets the standard for new rep training in ServiceTitan. All reps will use the Next environment during ride-alongs to mirror live appointments, while only pilot companies will complete daily practice jobs for added training.

Next Environment Access:

1. Reps log into the ServiceTitan Mobile account via iPad
 - If you don't see **"Next environment"** on the login screen, select Switch to a different environment and then click **"Next"**
2. Sales Manager logs into their "Next" environment to assign new reps their practice jobs
 - **If Desktop access:** <http://next.servicetitan.com>
 - **If mobile app:** And don't see "Next environment" on the login screen, select Switch to a different environment and then click "Next"
 1. You assign a lead (practice Job or Ride-along) like usual, just in the "Next" environment

Ride-Alongs:

1. Assign a new rep to an experienced rep
2. New rep observes rep during live appointment
3. Sales Manager assigns a real appointment to the new rep in the "Next" environment
4. New rep mirrors process in Next:
 - Dispatches
 - Arrives
 - Create and complete forms/estimates
 - Takes Photos alongside legacy rep and uploads to the project
 - Close job

Execution Guide: ServiceTitan

Pilot Companies North Creek Roofing and Bliss Roofing:

Practice Jobs

1. The VSU team creates practice Jobs during Week 0
 - Ready for distribution on Saturday before Week 1
2. Ensure the new rep logs into ServiceTitan “**Next environment**”
3. Assign 6 practice jobs (TRIAL RUN FOR NCR AND BLISS ONLY)
 - Follow Week 0-1 schedule to see when projects should be completed
4. Rep completes job workflow:
 - Dispatch
 - Arrive
 - Fill required forms and estimates
 - Upload all photos
 - Close job
5. Sales Manager reviews for correct dollar amounts, photos, and closure

Standards of Completion

- Practice jobs = closed job reviewed by SM
- Ride-alongs = closed job in Next with all required items
- SM is responsible for sign-off

Escalation

- Login/access problems, rep goes to SM
- Missing practice jobs on the reps dashboard rep goes to SM
- Jobs not on the dispatch board for SM in Next escalate to the VSU team