

## D2D PLAYBOOK

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# Table of Contents

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**Company Identity - 8**

**Leadership - 16**

**Structure/Accountability - 23**

**Recruiting- 37**

**Training - 48**

**Onboarding - 61**

**Culture - 69**

**Area - 82**

**Our Programs - 87**

# Your Business Objectives?

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## Objective

---

1.

2.

3.

## Goal

---

1.

2.

3.

**\*\*\*Objective 1 will directly tie to Goal 1 and etc.**

# D 2 D F O R M U L A



# Sales Opportunity

---

Today

Ave Per Rep Deal Per Year \_\_\_\_\_



Override Per Act \$ \_\_\_\_\_



# of Reps \_\_\_\_\_

---

Total

6 Months Goal

Ave Per Rep Deal Per Year \_\_\_\_\_



Override Per Act \$ \_\_\_\_\_



# of Reps \_\_\_\_\_

---

Total



## \$\$\$ on the Table

---

What is the value of  
one recruit that sticks  
1 year?

---

\$\$\$\_\_\_\_\_

What is the Value of  
Your team producing  
at 20% more than  
they are today?

---

\$\$\$\_\_\_\_\_

# Opportunity Cost \$

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How would business  
be different?

---

1.

2.

3.

How would my life be  
Different?

---

1.

2.

3.

# COMPANY IDENTITY

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# Company Identity

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## Core Values

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We make all business decisions based on these values: hiring, firing, meetings, systems, leadership, purchases, customer service, recruiting, marketing, etc... These values are what steer the business in the right direction.

## Purpose/Vision Statement

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Did you start your business because you wanted to make more money? Did the title CEO, or entrepreneur just sound cool? Did you do it out of circumstance? WHY do you do this job? And WHY does your business EXIST? If you are just another cog in the wheel you will lose steam and rely on all the other cogs to do the heavy lifting in making an impact in today's society. Take advantage of your opportunity and find ways to attach more meaning to what you do.

# Company Identity

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## Internal Creed

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What is the moto you preach to your internal team? What do you want your reps saying before they run out the door? When working for your company, how does one operate? EX: “Work Hard, Play Hard, Give Back.” “Crest Hustle” “We are Savage”

## Three Uniques

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It is crucial to get clear on what makes you unique because if you just use things like; “We have great customer service,” this is not going to have much weight in today’s world because everyone says that. Get very specific on what you do different.

Why work for you vs any other company? What are the accolades you have that no other teams or companies have won. What are you quality traits as a leader that should attract talent. What makes your opportunity great vs other opportunities out there?

# Company Identity

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## 5 Year Plan

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Start with the end in mind. Then reverse engineer it from there. Too often companies live year to year, not giving their people a clear reason for them to grow with the company. They always perform less than they potentially could perform because they have nothing long term to chase.

## Core Objectives

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Objectives are designed to make your business better. Example: Improve training platform. They tend to be things that aren't involved with sales, but lubricate and innovate the business so sales and installations are easier.

Objectives in a business help people understand what they are trying to accomplish in the next 30, 60, 90, 6 months, or 1 year.

Assign who is the captain that is leading the charge on the objective. Put deadlines, and map out the micro tasks that are needed to accomplish the objective.

# Company Identity

---

## Core Values

--	--	--	--	--	--

## Purpose/Vision Statement

--

## Internal Creed

--

# Company Identity

---

## Three Uniques - Internal

--	--	--

## Three Uniques - External

--	--	--

## Ideal Recruit

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# 5 Year Plan

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5 Year Plan		
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		

# Core Focus

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## OBJECTIVE TIMELINE \_\_\_\_\_

**Focus 1**

**Focus 2**

**Focus 3**

**Focus 4**

# LEADERSHIP

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“People don’t leave companies, they leave leaders”



# 4 Keys to High Level Leadership

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## Time Value Paranoia

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- What is your time worth per Hour?  
-----
- Working on the business or in the business?
- Budget time for things you VALUE
  - Family
  - Fun
  - Fitness/Soul

## Functions ... then People

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- Department Makeup
  - Sales | Ops | Finance
- Outline each job function and scorecard

## Leverage

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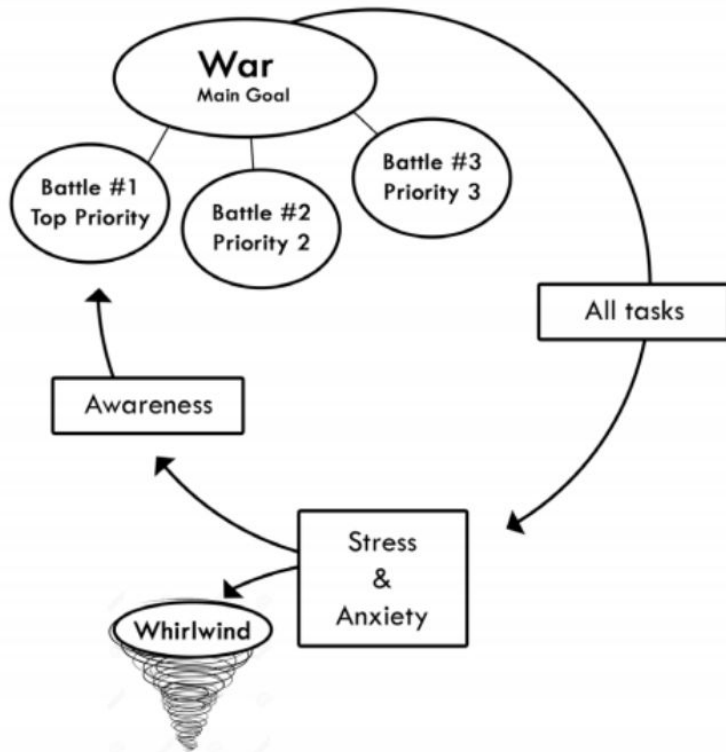
- Delegate it
  - Upwork
  - Project Management Tools
  - Effective Reporting
- Automate it
  - Zapier
  - CRM
- Eliminate it

## Planning

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- Weekly + Daily
- Family First - then fill with work
- 3 S's
- Battles that win the WAR

# D2D Planner



KPI's Goal/Actual	
Doors	50 / 35
Credits	8 / 5
Sales	3 / 3
Installs	3 / 2

**S**<sub>HRED</sub>  Gym 30 min

**S**<sub>YNC</sub>  Pray 2x

**S**<sub>KILLS</sub>  Watch 1 video in D2DU

**3 BATTLES**

- Clean apartment
- Call Steve and Army
- Send 10 follow up emails

**MINDSET**

- knocked all the hours
- smiled on every door
- worked out even when I didn't want to

---

**To Do/NOTES**

- Today I am going to practice
- the assumption close 5 x
- 
- 
- 
- Steve and Army
-

# Time Assessment

TASK	Time	Energy 1-10	TASK	Time	Energy 1-10

What do you do and how many hours do you spend on each task per week?  
How much energy does each of those tasks give you?

# Leadership Tips

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## Positions

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You must clearly define the positions and what the functions require in each position. Also clearly outline what the compensation plan is for each position. Before launching positions, overrides, or road maps - make sure to have a way to track and view accounting on these. The worst thing you can do is promise all this growth and forget about it. Sales reps end up resenting the opportunity instead of thriving in it.

## Leadership Development Program

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Leaders aren't born they are created. Most people focus on teaching basic sales skills, but never teach what it takes to be a leader. Create a system that is intentional about creating future leadership in your company. For Example: Leadership meetings weekly, Leadership Days, monthly, or quarterly where you teach how to: motivate, recruit, train, have tough conversations, handle problem situations, leverage, growth, etc... If you don't develop leadership you won't have any.

## Leadership without Pay

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There can be leadership roles that don't get paid. Reps knowing there is potential for them to move into leadership will take on roles and responsibilities in preparation to be a manager in the future. Everyone realizes there is training required for growth. Make leaders earn their spots. Avoid entitlement.

## Leadership Top Heavy

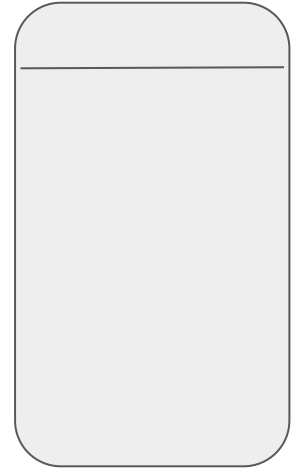
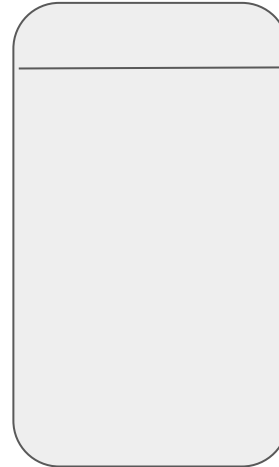
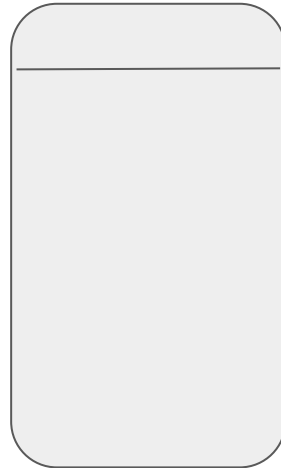
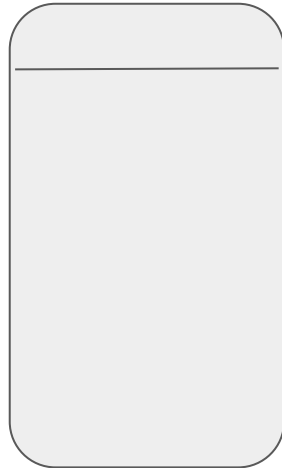
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Speed of the leader, speed of the team. Do not promote reps to become managers just because they had prior experience. The reality is, for someone to lead they need someone to lead. Managers have to start somewhere, but I caution you not to promote too quickly. It is easy to move people up the ladder, but it is challenging to move them back down once they have that title in their minds.

# COMPANY STRUCTURE

## Sales Department Structure

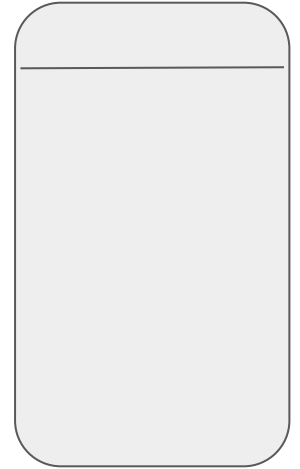
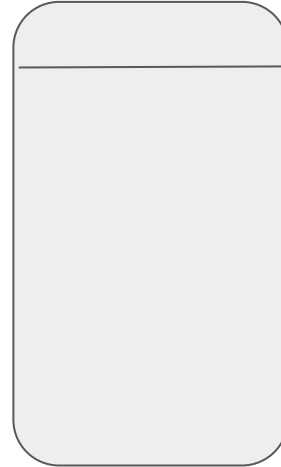
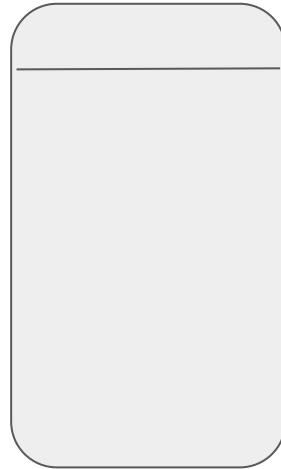
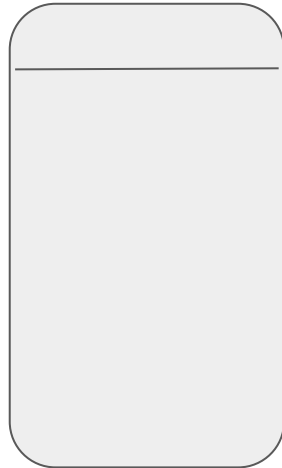
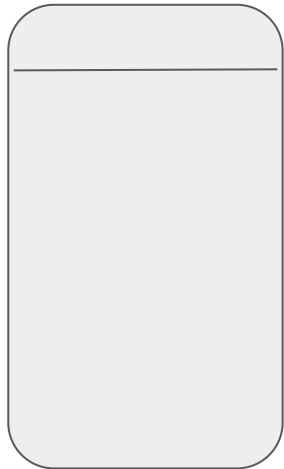
- Title \_\_\_\_\_
- Job Description
- Scorecard



# COMPANY STRUCTURE

## Ops Department Structure

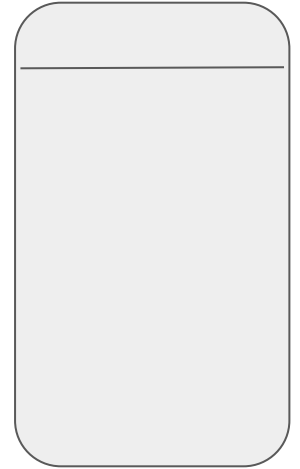
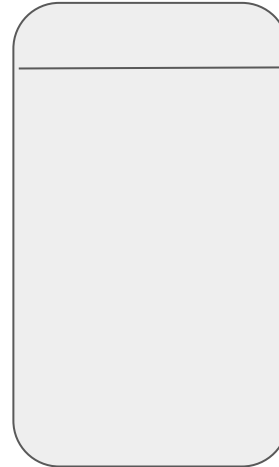
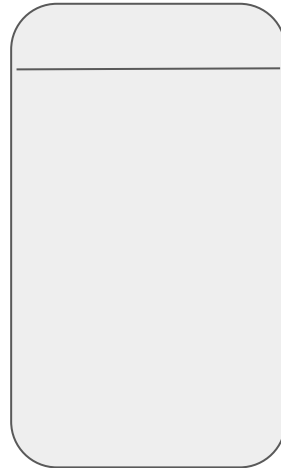
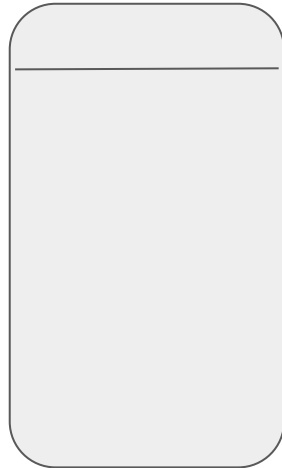
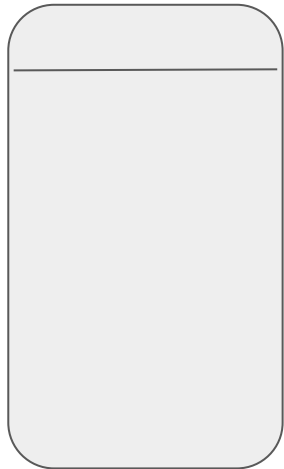
- Title \_\_\_\_\_
- Job Description
- Scorecard



# COMPANY STRUCTURE

## Finance Department Structure

- Title \_\_\_\_\_
- Job Description
- Scorecard



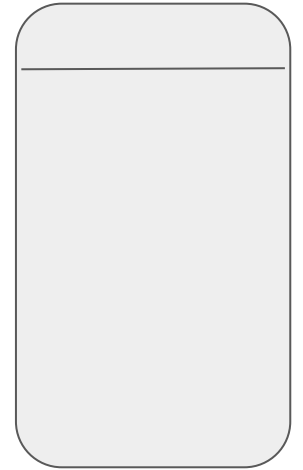
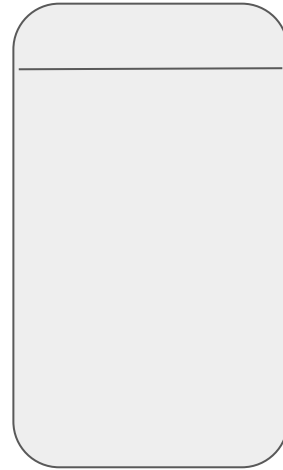
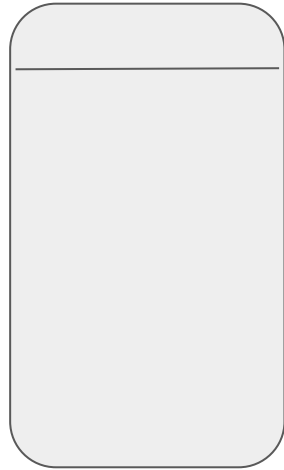
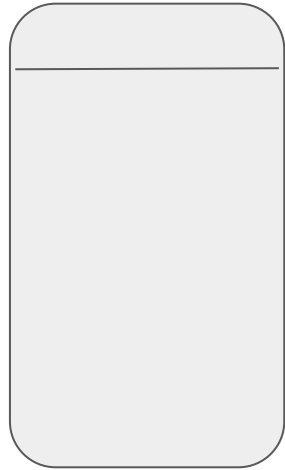
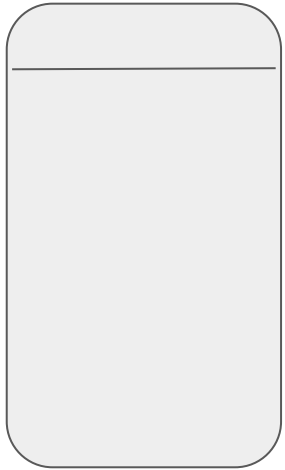
# COMPANY STRUCTURE

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## MICRO POSITIONS

What can you push off to an overseas person to help do some of the tedious jobs you don't like to do?

- Platform
- Budget



**AUTOMATE | DELEGATE | ELIMINATE**



# Office Organization

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OFFICE 1		BREAKDOWN
Manager		
Sales Reps		
Canvassers		
Monthly Volume		

OFFICE 2		BREAKDOWN
Manager		
Sales Reps		
Canvassers		
Monthly Volume		

OFFICE 3		BREAKDOWN
Manager		
Sales Reps		
Canvassers		
Monthly Volume		

OFFICE 4		BREAKDOWN
Manager		
Sales Reps		
Canvassers		
Monthly Volume		

# Key Players

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KEY PLAYERS			
WHO	ROLE	STRENGTHS	KPI's

# SCORECARDS

---

Name: _____		PROJECTS
1)		
2)		
3)		
4)		

Name: _____		PROJECTS
1)		
2)		
3)		
4)		

Name: _____		PROJECTS
1)		
2)		
3)		
4)		

Name: _____		PROJECTS
1)		
2)		
3)		
4)		

# KPI TRACKER

## WEEKLY ACCOUNTABILITY

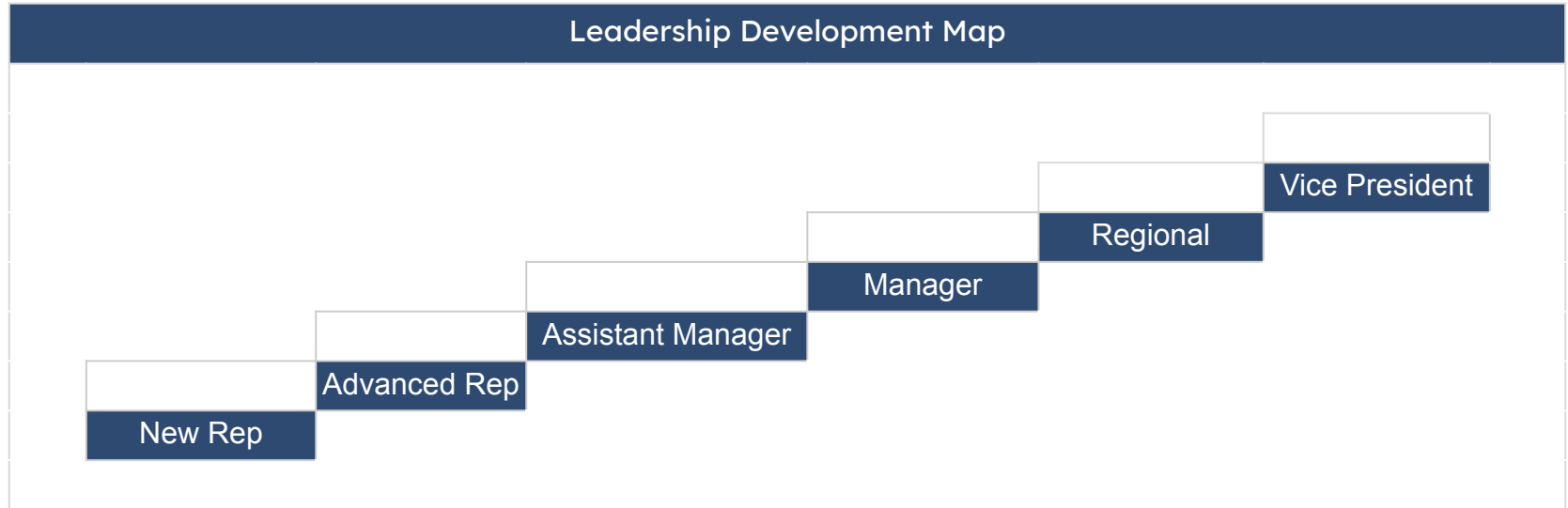
WEEKLY ACCOUNTABILITY																		
	Name_____			Name_____			Name_____			Name_____			Name_____			Name_____		
	Outside Sales			Inside Sales			Recruiting			Ops			Marketing			Biz Dev		
WEEK	Doors	Contacts	Closed	Leads	Demo	Sign	Prosp	Int	Sign	Built	Serv	Cancel	Posts	Revs	Eng	Proj	Cont	CD
1-7-2021																		
1-14-2021																		
1-21-2021																		
1-28-2021																		
2-4-2021																		
2-11-2021																		
2-18-2021																		
2-25-2021																		
3-4-2021																		

# Rep Development

REP DEVELOPMENT		
<b>New Rep</b>		What do They Get when They Graduate
Requirements		
<b>Advanced Rep</b>		What do They Get when They Graduate
Requirements		
<b>Assistant Mgr</b>		What do They Get when They Graduate
Requirements		
<b>Manager</b>		What do They Get when They Graduate
Requirements		
<b>Regional</b>		What do They Get when They Graduate
Requirements		

# Leadership Development

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# Tools Audit

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Tools Audit	
CRM	
Knocking App	
Competition Track	
Training Software	
KPI Dashboard	
Presenting Materials	
Signing Process	
Other	
Other	

# Compensation Tips

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## Compensate Behavior You Desire

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- Collect Activation - Pay more
- Self Gen Deals - Pay More
- Auto ACH - Pay More
- Company Gen Lead - Pay Less
- Quality of lead

## Clear and Universal

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- Transparency on Tracking
- Transparency on HOW pay works
- Avoid special deals and sign ons
- Clear - Signed Agreements
- Addendums when pay changes

## Based off Performance

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- Those that sell more - Get paid more
- Create a sliding scale to standardize pay bumps
- Avoid hourly and salary
- Recruiting comp
- Quick hits for Setters
- Pay based on what's in their control

## Accounting 100%

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- Don't miss a paycheck
- Deductions are trackable and transparent
- Report what each check is for
- Open door policy
- Coordinate with accounting dept before launching new pay scales



# Payscale (Rookie)

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ROLE 1 - COMP			Title	
Self Gen			Comp Gen	
Tiers	Volume	%/\$	Vol	%/\$
Tier 1				
Tier 2				
Tier 3				
Tier 4				

# Leadership Payscale

COMP			Title	
Override			Personal Sales	
Tiers	Volume	%/\$	Vol	%/\$
Tier 1				
Tier 2				
Tier 3				
Tier 4				

# Budget

NOTICE: Important things to Budget	
Lead Budget/Setter	
Closer Commission	
- Self Gen	
- Company Gen	
Manager Override	
Regional Override	
VP Override	
Recruiting Budget	
Culture/Incentives	
Misc/Materials	
Office Space	

Budget	
Fixed Cost	Cost

# Long Term Retention Plan

---

Long Term Incentives	
Incentive	Cost

# RECRUITING

---

“Would you rather go sell 1 account, or go recruit 1 person to sell 100 accounts for you”

# 8 Principles of Recruiting

## 1 Recruits Value

Do you understand the value of one recruit and the potential earnings you can make off that person? How much does it cost you to get one recruit to stick, and what is the ROI?

## 3 Leagues

- A's recruit A's and B's
- B's recruit C's
- C's don't recruit anyone

## 2 Hats

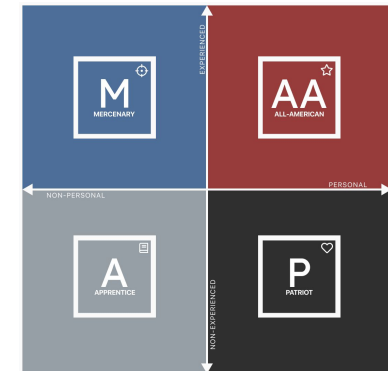
### Sales Professional

- Builds Rapport
- Proves Credibility
- Impresses
- Earn their trust
- Finalize it now
- You are grateful for them

### HR Professional

- Is indifferent
- Is Skeptical
- Hard to impress
- They earn yours
- Need time to consider
- They are grateful for you

## 4 Classes



# 8 Principles of Recruiting

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## 5 Platforms

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- Source
- Interview
- On-board
- Train
- Retain

## 6 Branches

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- Your Circle
- Your Circles Circle
- Headhunting
- Public Encounters
- Events
- Web

## 7 Deadly Sins

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- Lack of Vision
- No Data Reporting
- Un-Organized
- Lack of Systems
- Singing Different Songs
- Necessity over Consistency
- Self Serving vs Serving

## 8 KPI'S

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- 1) Resumes Received-> Screening Interview
- 2) 2nd Interview Show Rate
- 3) Final Interview -> Job Offer
- 4) Offer Created -> Offer Completed
- 5) Job Offer -> Training Attendance
- 6) Training Attendance -> 2nd Day
- 7) 2nd Day -> 1st Sale
- 8) 1st Sale -> Graduating Training

# ABC's Matrix

**A's** recruit and lead **A's** and **B's**  
**B's** recruit and lead **C's**  
**C's** don't recruit or lead anyone

## ABC's Matrix

C's



**LIABILITIES**  
Is a problem  
Driven by fear  
Dishonest  
Bad habits  
Unhealthy  
Unkept  
Needs to be managed  
Disorganized  
Unmotivated  
Work - need to do

B's



**LABORERS**  
Sees problems  
Driven by recognition  
Honest with others  
Developing habits  
Trying to be healthy  
Kept  
Manages himself  
Organized  
Can be motivated  
Work - like to do

A's



**LEADERS**  
Sees solutions  
Driven by principals  
Honest with himself  
Good habits  
Healthy  
Polished  
Manages everything  
Systematic  
Obsessed  
Work - a part of them



# Recruiting Strategy

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CURRENT STRATEGY					
Method	Spend/month	Hires/_____	Hires/_____	Hires/_____	Hires/_____

How are you currently recruiting and what has that looked like the last few months

Recruiting Goals

# Growth

RESPONSIBLE GROWTH RATE			
Hires Per Week			
NOTES			
GROWTH RATE			
OFFICE	HIRES	ACT	HEAD COUNT
Office 1			
Office 2			
Office 3			
Office 4			
Office 5			

# Recruiting Schedule

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WHEN DO YOU BLOCK TIME ASIDE TO RECRUIT	
Campus Recruiting	
Networking Events	
Warm Market Contacts	
Public Encounters	
Online Job Posting	
Experienced Rep Contacts	

Leadership is responsible at creating a system for their teams to follow when it comes to consistent recruiting.

Set time aside weekly or monthly where you you have uninterrupted recruiting sprints

# Recruiting Compensation Tips

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## Quick Hit

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- Have a *simple* incentive to bring in active bodies
- Fast Track Program

## % of Manager Override

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- This would be an assistant manager, or manager in training.
- Only give this when you believe the recruiter is on a path to leadership and running those recruits on his own one day.

## Recruiter Override

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- Fixed dollar/percentage per sale that recruiter gets forever on the rep that he brings in.
- Make it small because you want a good chunk of your recruiting budget to go to the manager for leading them.

## Long Term Incentive Plan

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- Create opportunity for your key leadership to earn SWEAT equity.
- Carve out a pool of shares. Shares based off people's production in comparison to the rest of the team. They get that % of equity in that pool of shares.

# Recruiting Compensation

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Recruiting Compensation	
Personal Recruits	
Non - Personal Recruits	
Managed Recruits	
Short Term	
Long Term	

Corporate Recruit Deductions
How are you Tracking it?

What am I willing to Spend to Create a Full Time Rep?

# Pipeline Progression

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Applicant pipeline progression	
Step 1	
Step 2	
Step 3	
Step 4	
Step 5	
Step 6	
Step 7	

When you have someone interested in the job, what is the flow of that applicant?

# 100 List - Race to 24

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Type	NAME	Type	NAME	Type	NAME	Type	NAME

# TRAINING

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“Respect the training, honor the commitment and cherish the results”



# Analyze Training and Onboarding Today

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What do we have to give new reps?

---

- 
- 

Who is overall in charge of company training experience? (Dean)

---

- 

Who does Training in person and digitally?

---

- 
- 

What is the delivery of materials look like? Speed, re-ordering, inventory etc?

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-

# Current Experience

CURRENT CANDIDATE EXPERIENCE								
Stage 1		Stage 2		Stage 3		Stage 4		Stage 5
NOTES				MATERIALS NEEDED				Training pay

When you are ready to offer the job, what does the reps experience look like and how do they get onboarded and selling fast?

Name each stage = Clarity on Where Applicant Stands

# Tips on Training Systems

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## No System - No Scaling

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- To replicate top talent fast you need a training system. This will not only maximize your time and production, but your reps as well. Remember, people are going to sink or swim in this job. The goal is to create a successful path for them to swim faster and sooner.
- With improper training and systems you lose top potential talent. Don't let people slip because you were too cheap, busy, or lazy to put resources together.
- Good training systems are a recruiting tool. This is something reps look for when deciding what company to work for. Who is going to teach me how to make the most money and how?

## Accessible Content

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- Get D2D University and have us assist you in building your online portal. Training manuals have been effective at times; however, reps need the ability to self-train and review at any time. This avoids confusion, managerial stress and calls bogging down the leaders.
- Empowers sales reps to learn on their own and internalize the principles taught in the meetings, in person and in the field.
- Eliminates the excuses reps create around improper training, attention, support, etc. The rep has full accountability for his/her success in individual study.

# Tips on Training Systems

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## Self-Development

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- Leaders must set the example for self-learning and growth. Creating an incentive for sales reps to learn outside the field and classroom will assist in achieving optimal results.
- Accountability and reporting are **required** to ensure sales reps are retaining training information in order to scale your team and averages.
- Assists in identifying who is fully committed.

## Content

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- Short and simple step by step ways to sell and fulfill all sales processes. Sales reps have short attention spans. Keep your videos 1-4 mins each.
- Create clear sales trainings. Example: “10 Step Closing Process.” Where it would be easy to remember the 10 steps.
- Create content to where you can empower reps to become self-sufficient. Empower them to go find the answers in the content vs always having to come to you with their problems.

# Tips on Training Systems

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## Classroom Training

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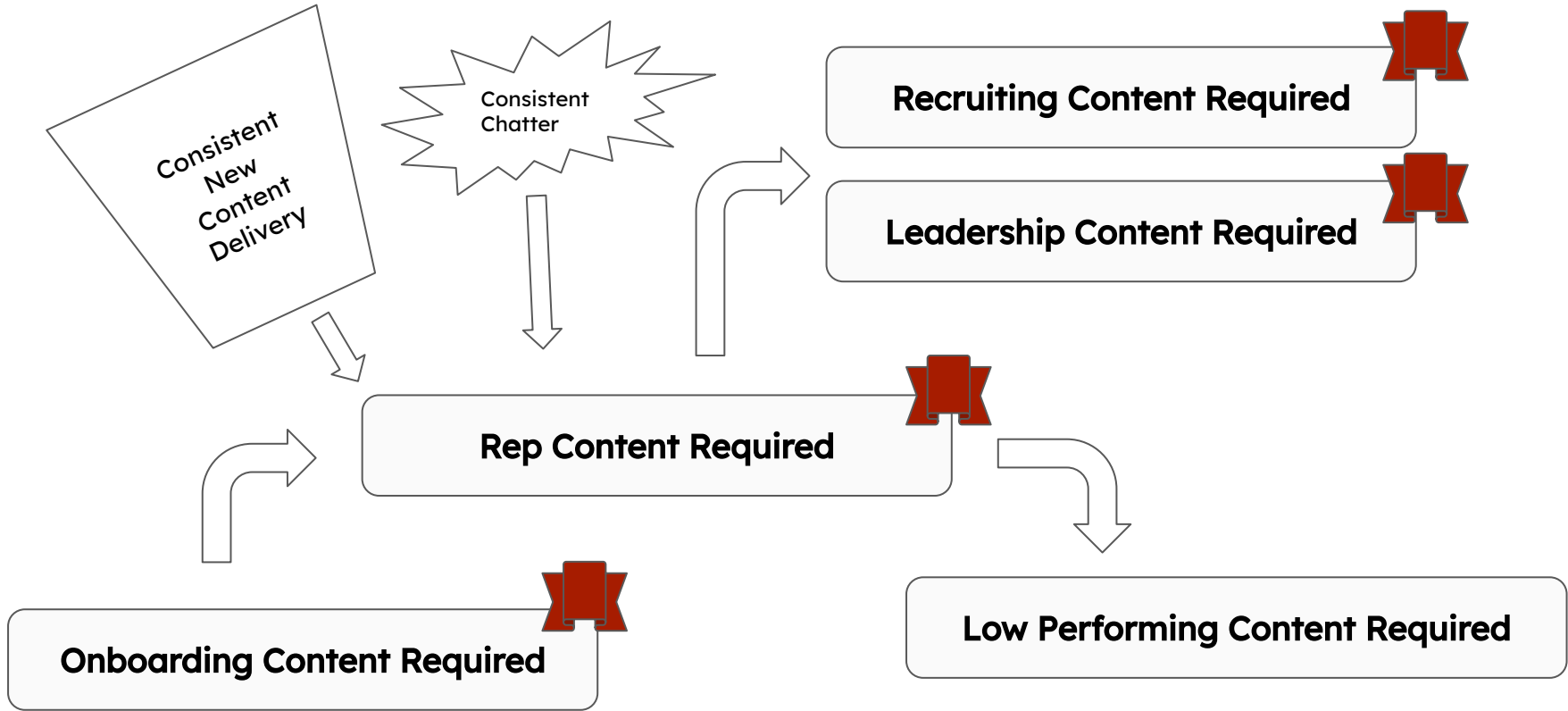
- Make sure to deliver valuable content that is easy to consume and is **bite size**. Most people don't retain much of what is taught in the classroom, so it's important to focus on one thing at a time and make it interactive.
- Focus on **ROLE PLAYS**. Role playing can be embarrassing, and unrealistic; however, If you take role playing seriously, this can be one of the most effective places to assist in critiquing sales reps body language, pitch, and actually replicate what they are saying and how they are saying it on the doors.
- Have different meetings for different skill levels. If you are always training on the basics the veteran reps are going to get bored and *challenge* your ability to create inspiring relevant trainings. This is where D2DU comes in handy.

## In Field Training

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- Take your reps out and **SHOW** them how to do it.
  - Teach them the Law of the Harvest
  - Show them what it takes to be successful
    - Work the hours
    - Have a positive attitude
- Shadowing is a great tool; however, remember: see one, do one, you're on your own. Knowing the sales rep will sink or swim, hold a meeting the next morning to go over what they are learning and review questions that came up on the doors, or problems mentally or physically arose.

# Training Map



# D2DU - ONLINE TRAININGS



## SOLAR.D2DU

All you will ever need to know to sell solar start to finish from door knock, to presenting, to objection, to closing deals.



SOLAR.D2DU

Click Here To See Pricing

LEARN MORE



Foundations: Solar Overview

6 | 1h 48m

SELECT



Solar Knocking 101

16

SELECT



Setter

11

SELECT



Objections

5 | 2h 9m

SELECT



Live Door Approach Examples

15

SELECT



Mikey Lucas: Solar Information

4 | 45m

SELECT



Solar Presenting Principles

12 | 4h 44m

SELECT



Presentation Deep Dive: Chris Adams

10 | 2h 9m

SELECT



Sam Taggart: Selling A Customer via Zoom

1 | 1h 6m

SELECT



Advanced Solar

6

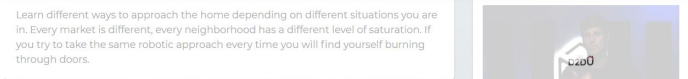
SELECT



Presentation Deep Dive: Mike O'Donnell

22

SELECT



All Chapters

- 1. Basic Pitches - Intro to Setter START
- 2. Basic Pitches - Net Metering Explanation START
- 3. Basic Pitches - Rent vs Own START
- 4. Steps - Interest - Little Information START
- 5. Steps - Interest - More Information START
- 6. Steps - Legitimacy START
- 7. Steps - Solidifying The Appointment START
- 8. Steps - Transition START
- 9. Tips - Limit Information START
- 10. Tips - No Appointment START
- 11. Tips - Pull Back START

Course Completion: Not Started (0 / 11) 0%

# Course Creation Content

---

## INTRO

### Welcome to "Company"

Who is "Company" | Past - Present - Future

Cores Values

Mindset | Buy-In

Work Ethic

My "3 Keys to success"

Can be done by multiple reps

My "3 Biggest Obstacles in this Job"

Can be done by multiple reps

### Introductions and why "Company"

Why "Company"

Team Activities

Why "Company"

Competitions

Why "Company"

Prizes|Fun

Rep/Leader 1

Rep/Leader 2

Rep/Leader 3

Rep/Leader 4, etc...



# Course Creation Outline Cont.

## SALES PROCESS

### The Pitch

- Overview to the door approach  Could be broken down into 5 videos
- Steps Broken Down
- Rep Door Approach 1
- Rep Door Approach 2
- Rep Door Approach 3, etc...

### Presenting

- Overview of Presenting Steps  Could be 10 Videos
- Role Play | Examples | Live

### Closing

- Overview of Closing Steps  Could be 5 Videos
- Standard Close
- Rep Close 1
- Rep Close 2
- Rep Close 3, etc...

### Deal Submission

- All Paperwork  Screen Record
- Where to Input Data
- How Do I Get Paid?

### Tools

- CRM  Screen Records
- Applications

## Objections

- I need to think about it  Explanation - Role Play | Live
- Not Interested  Explanation - Role Play | Live
- Cost Too Much  Explanation - Role Play | Live
- Just Give Me a Card  Explanation - Role Play | Live
- I've Already Looked At This  Explanation - Role Play | Live
- No Need  Explanation - Role Play | Live
- Cost More Than Competitors  Explanation - Role Play | Live
- Need to Research you/product  Explanation - Role Play | Live
- Spouse is the Decision Maker  Explanation - Role Play | Live

## ADMIN

### On-Boarding

- Training  Breakdown Each Step
- Daily Schedule
- Expectations
- Goals
- Area Management
- Group Messaging
- Company Website
- Meeting Structures

# Course Ideas

---

Additional Course Creation Ideas and Map			
Course/Topic	Video	Status	Notes

What content do you need to make to avoid your phone ringing with dumb questions over and over again?

What content do you find yourself training on over and over again and hate training on it?

What certification or graduation processes could you make to give recognition and standardization to rep and leadership development in your company?

# In-Person Training

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IN PERSON TRAINING PROCESS	
Person in Charge	
Who	
When	
How Often	
Field?	
Field Trainer?	
Territory 1	

# Online Content

---

ONLINE CONTENT	
Who Makes Login	
When	
How Often?	
Requirements	
Certificates?	
Compensation	
Upkeep?	
Reporting	
Consistent Eng.	

# On-Board Process

---

ON- BOARD PROCESS NAME	
Step 1	
Step 2	
Step 3	
Step 4	
Step 5	
Step 6	
Step 7	
Step 8	
Step 9	
Step 10	

# On-Boarding Checklist

---

ONBOARD CHECKLIST:	
Task	Completed?

# Bootcamp | Orientation

---

Onboard Bootcamp   Orientation					
Topics					
Where					
When					
How Often					
Who Trains					

# Graduate Requirements

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## Graduated Rep Requirements

Graduated Reps = Reps that have completed a certain amount of sales and onboarding checklist items to ensure long term success



# Fast Start

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Fast Start		Date Range
Tier	Volume	Prize
Tier 1		
Tier 2		
Tier 3		
Tier 4		
Tier 5		
Who		
How		

How are you going to get reps selling FAST out the gate to see money come in quick. High ticket 30 days, Lower ticket 14 days.

# Ideal Experience

IDEAL CANDIDATE EXPERIENCE									
Stage 1		Stage 2		Stage 3		Stage 4		Stage 5	
NOTES				MATERIALS NEEDED				Training pay	
NOTES									

# Goals

6 MONTH GOALS					
TOTAL RECRUITS		OPPORTUNITIES PER WEEK		DEMOS	
TODAY	GOAL	TODAY	GOAL	TODAY	GOAL
CLOSED		REVENUE		OFFICES	
TODAY	GOAL	TODAY	GOAL	TODAY	GOAL

# Sales Accountability

---

Onboard Bootcamp   Orientation					
	OFFICE 1	OFFICE 2	OFFICE 3	OFFICE 4	OFFICE 5
Contacts Made					
Demos					
Closed Deals					
Closing %					
Installs					
Job Size					

# CULTURE

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“Culture is the process by which a person becomes all that they were created capable of being.”

Thomas Carlyle

# CULTURE

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Culture is Free Energy Created by Intentional Systems Properly Implemented and Followed

## Schedule

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- Leadership mtgs
- Sales Meetings
- Supplemental trainings
- Team Activities
- Knocking Times

## Competitions

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- Transparency on Tracking
- Transparency on HOW pay works
- Avoid special deals and sign ons
- Clear - Signed Agreements
- Addendums when pay changes

## Clubs

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- Champions Club
- Milestone or Hat Club
- Company Gen Lead - Pay Less
- Quality of lead

## Accounting 100%

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- Don't miss a paycheck
- Deductions are trackable and transparent
- Report what each check is for
- Open door policy
- Coordinate with accounting dept before launching new pay scales

# Sales Meetings

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- High Energy - Role: DJ
- Greet Reps with Energy - Role: Greeter
- Numbers - Role: Numbers Guy
- Recognition - Role: Numbers Guy/Leader
- Clubs - Role: Clubs Guy
- Announcements - Role: Leader
- Training - Everyone get involved
- Motivation - Role: Motivation Guy

Sales Meetings			
Activity	Time Limit	Captain	Implemented

# Leadership Meetings

---

- Leadership Training: 20 min
- Problems and Pulse: 10 min
- Accountability: 5-10 min
- Motivation: 3 mins
- Area Management
- Personnel
- Inventory

## Leadership Meetings

Activity	Time Limit	Captain	Implemented



# General Schedule

---

## GENERAL SCHEDULE

ACTIVITY	S	Time	M	Time	T	Time	W	Time	TH	Time	F	Time	SA	Time
Leadership Meeting														
Sales Meeting														
Required Knocking hrs														
Bootcamp/Orientation														
Supplemental Training														
Team Activities														
Recruiting Designated														
1on1 Performance Int														

# Competition Do's and Don'ts

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## Do's

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- Always have a meaningful competition going on
- Ask you team what they get motivated by when it comes to prizes
- Map out the competitions well ahead of time
- Create names for the competitions and reuse them for years to come
- Promote competitions well before they happen
- Have clear transparent ways they are displayed to your teams and updated
- Be consistent with how you run and score them
- Create clear defined rules ahead of time, and what it takes to win. Qualification requirements are clear
- Constantly talk about the competitions


## Don'ts

- Launch a competition and halfway through just forget about it
- Don't favor certain people or teams. Make an equal playing field
- Don't always make it about the prizes. Make it more about the pride of winning

# Champions Club

“Don’t treat all players the same”

## CHAMPIONS CLUB

	5 IN A WEEK	FINISH TRAINING	SALE BEFORE 3	SALE AFTER 8	READ X BOOK	7 IN A WEEK	3 ON SAT	SALE BEFORE 2	SALE AFTER 8-30	READ X BOOK	8 IN A WEEK	4 ON A SAT	2 BEFORE 2	SALE AFTER 9	READ X BOOK	20 CONSECUTIVE DAYS	10 IN A WEEK	50 IN A MONTH	5 SPOT	READ X BOOK	CHAMP
KYLE	●	●	●		●																
BRIAN	●	●	●	●	●	●		●													
SARAH	●			●	●																
CONNER		●							●												
TIMOTHY	●	●	●	●	●				●	●											
MATTHEW	●	●	●	●	●	●				●											
JOHN	●	●			●																
JEFFREY		●		●	●																

# Clubs

---

Name
Notes

Name
Notes

Name
Notes

Name
Notes

# Competitions

Map out a 12 Month Calendar for you important competitions

Competitions & Incentives		
Names	Dates	Executed

# Competition

---

Name
Notes

# Culture Contributors

---

CULTURE CONTRIBUTORS		
ACTIVITY	CAPTAIN	VALUE

# Lead Flow

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CURRENT LEAD FLOW					
Lead Creation		Close Deal		Manage to Install	
Title		Title		Title	
Expectation		Expectation		Expectation	

IDEAL LEAD FLOW					
Lead Creation		Close Deal		Manage to Install	
Title		Title		Title	
Expectation		Expectation		Expectation	



# Tax Efficiency Review

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## Tax Efficiency Review

1099 vs W2

Leasing Business

401K

Healthcare

S-Corp

Business Vehicles

CPA?

Depreciation

# Area Management Strategy

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## Importance

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- Create stories around certain areas.
- Mismanage potential areas.
- Get kicked out and blocked from areas.
- Create frustrations within your teams/potential customers.
- Waste time.
- Lose out on deals.
- Higher attrition.
  - And much much more

## Consolidate

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Put your reps all close to each other. This makes it simple when reps need support closing. This also makes it easy for you to form carpool groups. You want to know where your reps are knocking and that they are in turf. I would rather drive 2 hours away every day and knock knowing my people are out on the doors, than drive 15 mins away to knock with the simple temptation of reps going home or not being out the hours they are supposed to.

## Why Strategize

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- Organization..
- Time Management skills.
- Maximize turf and production.
- Structure: so reps can focus on selling instead of who they are going to talk to.
- Trust.
- Consistency

## Re-Knocking

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It takes 7 no's to get a yes. Re-knocking is important to the business because you can create brand awareness and concentrated customer bases. It also gives opportunity to better bandwagon and manage referrals. It has been proven by many industries and companies that the best areas are ones that have been previously hit and had success. Instill this into your company culture watch results take off.

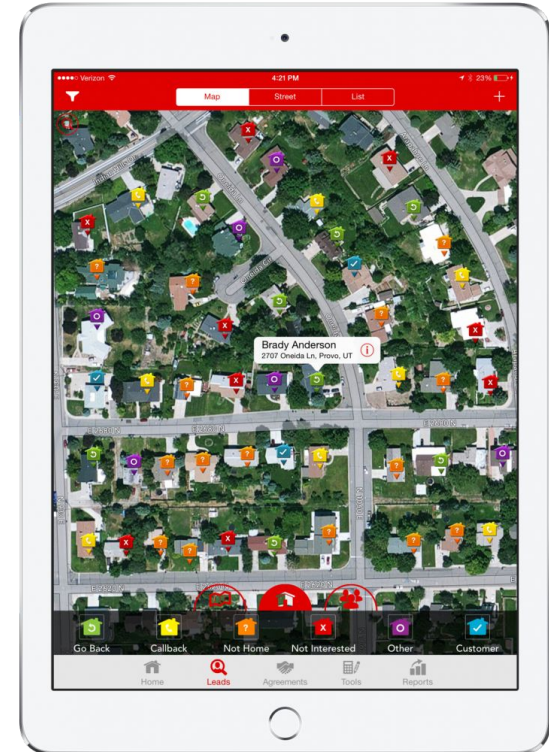
# Utilize the Apps

## Track for Sales Performance

- Track Activity
  - Knowing where people are knocking, how often, and when. This helps hold them accountable to a full workday
- Know the data
  - This helps you better diagnose what issues reps are running into and where you need to spend your training and leadership.

## Create Competition

- When you can trust your people to accurately disposition their activity, have the data, you can create competitions and dashboards around the data.
- This will automatically exposure and recognition for the behaviors you wish to drive.



# SalesRabbit Rep Success Formula



**MOTIVATION**  
HOURS/DAY



**EFFICIENCY**  
CONTACTS/HOUR



**MASTERY**  
SALES/CONTACTS



**SUCCESS**  
SALES/DAY

BASE LINE

4

3

9.0%

1.4

IMPROVE

19%

15%

3%

41.0%

RESULTS




5.95

3.45

9.3%

1.9

# SalesRabbit Organizational Formula

	 SALES SALES/DAY	 GROSS REVENUE \$ INCREASE / DAY	 ROI \$ INCREASE / DAY
BASE LINE	202.5	\$20,250	<b>\$8,293</b>
IMPROVE	41.0%	41.0%	
RESULTS	285.4	\$28,543	

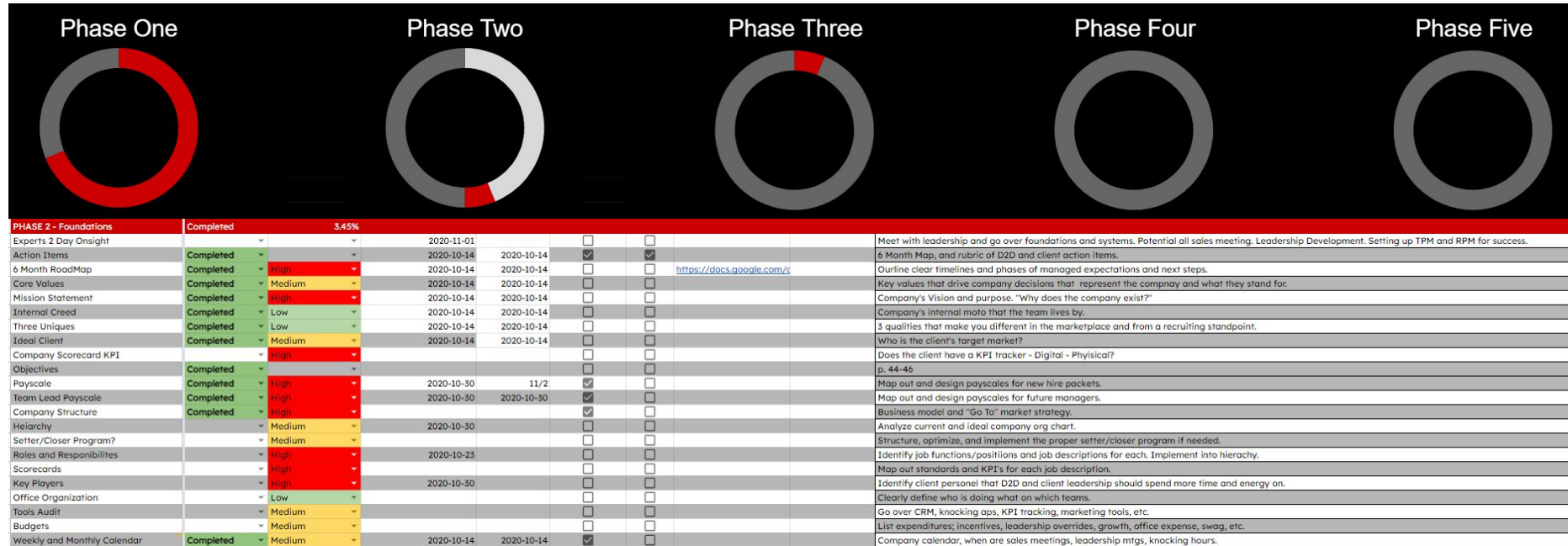
GROSS \$ / SALE

**\$100**

REP COUNT

**100**

# Track Your Progression



# OUR PROGRAMS

## D2DU - Corporate Act

Experts Coaching Packages	Corporate Set-up
Included Benefits	\$9,900
Custom Domain	✓
White Label	✓
1 In Person Film Day	✓
12 Months Video Edits	✓
Bulk Migration Users/ Content	✓
Monthly CSM Reporting	✓
4 Implementation Calls	✓

Monthly User Fees				
5-10	10-24	25-49	50-99	100+
\$79	\$59	\$49	\$39	\$29

## Team Builder

Team Builder	Level 1
Included Benefits	\$5000
Company Recruiting Training	
Recruitomatic	✓
Weekly Reporting	✓
Recruiting Consulting Calls	✓
10-13 Qualified Candidates	✓

Placement fee = \$775

\* Hired

\* Attended initial training

\* Survived 1 Day in Field

# OUR PROGRAMS

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## D2D FINANCE

<b>FINANCIAL EXPERT 6 months</b>	
<b>Included Benefits</b>	<b>\$10,000</b>
2 Day Visit	✓
1 Day Follow Up Visit	✓
4 Coaching Calls	✓
Book Review and Set Up	✓
Budgets and Planning	✓
Dept Training	✓
Online Trainings	✓



# UNFAIR ADVANTAGE = \$185,900

D2DU	
<b>Included Benefits</b>	<b>\$9,900</b>
Custom Domain	✓
White Label	✓
1 In Person Film Day	✓
12 Months Video Edits	✓
Bulk Migration Users/ Content	✓
Monthly CSM Reporting	✓
4 Implementation Calls	✓



Team Builder	
<b>Included Benefits</b>	<b>\$5000 mo</b>
Recruitomatic	✓
Weekly Reporting	✓
Recruiting Consulting Calls	✓
<b>10-13 Qualified Candidates</b>	✓

FINANCIAL EXPERT 6 months	
<b>Included Benefits</b>	<b>\$10,000</b>
2 Day Visit	✓
1 Day Follow Up Visit	✓
4 Coaching Calls	✓
Book Review and Set Up	✓
Budgets and Planning	✓
Dept Training	✓
Online Trainings	✓



Consulting	
<b>Included Benefits</b>	<b>\$106000</b>
2 Day On-Site - Sr Expert	✓
<b>5 Days - Bombsquad</b>	✓
1.5 Days Follow Visit - Sr Expert	✓
1hr Coaching Call 2x Mo	✓
2 - 1.5 Days - Deep Dive Utah	✓
Spring Sales Summit - 2 Tix	✓
Fall Recruiting Summit - 2 Tix	✓
D2DCON - 2 Mastermind	✓
D2DCON - 2 Gen Admin Tix	✓
Business Boot Camp	✓
Marco Polo - Coaching	✓
Weekly Company Sales Training	✓

Monthly User Fees - FREE				
5-10	10-24	25-49	50-99	100+
\$0	\$0	\$0	\$0	\$0

# NOTES

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# NOTES

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# NOTES

