

Sample of a New Salesperson Onboarding Plan



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ABC MOTOR COMPANY

Onboarding Auto Sales

Day 1: Orientation/Paperwork with *Comptroller* * Tour of facility and grounds with Meet & Greet of sales and service staff/ Parking area/Day Off/ Scheduling/ Office Supplies/Computer/Passwords with Tim / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. – 3:00 p.m. Orientation with basic CRM process, forms, computer log in and Passwords, STARS , Tewart link / Office Setup, Review of Expectations and Q&A with Floor Manager

DAY 2: Review and Q&A 8:30 a.m. with Floor Manager / 8:45 a.m. begin training with Tewart SALES PROCESS 8:45 a.m. – 12:00 Noon (ten minute break every 50 minutes) / Lunch 12:00 Noon to 1 p.m./ 1:00 p.m. Review with Floor Manager and continue Tewart training 1:00 p.m. – 4 p.m. / 4 p.m. – 5 p.m. 1 on 1 with Floor Manager / Review and Q&A with Floor Manager

DAY 3: 8:30 – 8:45a.m. Review with Floor Manager / Tewart Training 8:45 a.m. – Lunch 12:00 Noon – 1 p.m. / Tewart Training 1 p.m. - 3 p.m. (Breaks every 50 minutes) / 3 p.m. – 4 p.m. Create list of prospects from businesses, civic groups, etc. Prospecting one on one with Floor Manager / 4 p.m. – 5:45 p.m. Tewart training PROSPECTING / Review and Q&A with Floor Manager

DAY 4: 8:30 - 8:45 a.m. review with Floor Manager / 8:45 a.m. – 12:00 Noon Ford Product Training / 12:00 Noon – 1:00p.m. Lunch / 1:00 p.m. – 4:00 p.m. Ford Product Training (mandatory breaks during all training every 50 minutes) 4:00 p.m. – 4:30 p.m. 1 on 1 with Floor Manager / 4:30 – 5:45 p.m. Tewart training / 5:45 – 6:00p.m. Q&A with Floor Manager

DAY 5: 8:30 – 8:45 a.m. Review with Floor Manager / 8:45 a.m. – 12:00 Noon Ford Product Training / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. – 5:00 p.m. thoroughly go over/push buttons, turn knobs become very familiar with the vehicles and test drive each model, review 1 on 1 each model as soon as each training segment is completed / 5:00 – 5:45 p.m. Listen to sales staff working deals / 5:45 – 6:00 p.m. Weekly Close-out with Sales Managers and Floor Manager

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Onboarding Continued

(Week Two)

Day 1: 8:30 – 8:45 a.m. Review with Floor Manager / 8:45 a.m. – 12:00 Noon Tewart training / 12:00 – 1 p.m. Lunch / 1:00 – 4:00 p.m. 1 on 1, review, role play with Floor Manager / 4:00 p.m. - 5:45 p.m. observe/listen sales staff working deals sit in with Mgr.desking deals / 5:45 – 6:00 p.m. Review Q&A with Floor Manager

DAY: 2 8:30 – 8:45 a.m. Review with Floor Manager / 8:45 a.m. 8:45 – 9:45 a.m. Walk the Trade with Mgr / 9:45 – 12:00 p.m. Noon Walk-Around training with sales staff and Floor Manager / Noon to 1:00 p.m. Lunch / 1:00 – 4:00 p.m. Tewart training / 4:00 -5:45 p.m. Observe Listen to sales staff work deals with customers, Mgr. and F&I. / 5:45 – 6:00 review Q&A with Floor Manager

DAY 3: 8:30 – 8:45 a.m. Review Q&A with Floor Manager / 8:45 a.m. – 9:45 a.m. walk-around with Floor Manager / 9:45 – 12:00 Art of the Sale Floor Manager will sell you a Car / p.m. 12:00 p.m. to 1:00 p.m. Lunch / 1:00 p.m. – 3:45 p.m. CRM training, loading deals, load trades with Mgr / 3:45 – 4:45 p.m. desking with Mgr. / 4:45 – 5:45 p.m. Negotiations, Closing with Floor Manager / 5:45 – 6:00 p.m. review Q&A with Floor Manager

DAY 4: 7:30 – 12:00 p.m. Assist Detail Shop / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. – 5:00 p.m. Assist Detail Shop / 5:00 p.m. Review Q&A with Floor Manager

DAY 5: 7:30 a.m. – 12:00 Noon Assist/Observe Service Writers / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. – 5:00 p.m. Assist/Observe Service Writers / 5:00 p.m. Weekly Close-out with Sales Managers and Floor Manager.

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Onboarding Continued

(Week Three)

DAY 1: 8:30 a.m. – 8:45 a.m. review with Floor Manager / 8:45 a.m. – 12:00 Noon Tewart training / 12:00 Noon – 1:00 p.m. Lunch / 1:00 – 2:00 p.m. Walk-Around Training / 2:00 – 3:00 p.m. trade walk and drive / 3:00 – 5:45 p.m. Observe, Listen, SHADOW sales staff with customer / 5:45 Review and Q&A with Floor Manager

DAY 2: 8:30 a.m. – 8:45 a.m. review with Floor Manager / 8:45 - 9:45 a.m. Creating Prospect List – Your Circle with Floor Manager / 9:45 – 12:00 Noon Tewart training / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. 2:00 p.m. What you Need to Work a Deal with Floor Manager (Handout) / 2:00 – 3:00 p.m. Quality time with Kern – sharing sales skills and tips / 3:00 - 5:00 p.m. Negotiation Skills and Role Play with Floor Manager / 5:00 – 5:45 p.m. Observe/Shadow sales staff with customers / 5:45 – 6:00 p.m. review and Q&A with Floor Manager.

DAY 3: 8:30 – 8:45 a.m. review with floor manager / 8:45 – 12:00 Noon CRM training, review - Loading customer, credit, vehicle, trade, worksheet, Vincent – using CRM to follow up, email, call, notes... / 12:00 Noon – 1:00 p.m. Lunch / 1:00 – 4:00 p.m. Shadow sales staff with customers – this includes walking to a car that is “just driving thru.” 4:00 – 5:00 p.m. Quality time with Mgr. / 5:00 – 5:45 p.m. Shadow sales staff / 5:45 – 6:00 p.m. review Q&A with Floor Manager.

DAY 4: 8:30 – 8:45 a.m. review with Floor Manager / 8:45 – 12:00 Noon Mystery Shop, Marion Ford / Marion Mercedes / 1:00 p.m. review with Floor Manager 1:30 – 4:00 p.m. Mystery Shop – at least two dealers of your choice. 5:00 p.m. review with Sales Managers and Floor Manager.

DAY 5: 8:30 – 8:45 a.m. review with Floor Manager 8:45 – 12:00 Noon Go thru entire sales process with Floor Manager – sell me a car and get me to finance. 12:00 Noon – 1:00 p.m. Lunch / 1:00 – 5:45 p.m. Hands on walk-around, product training, overview new and preowned / 5:45 – 6:00 p.m. Weekly Close-out with Sales Managers and Floor Manager

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Onboarding Continued

(Week Four)

DAY 1: 8:30 – 8:45 a.m. review with Floor Manager / 8:45 – 9:45 a.m. trade walk with Floor Manager and sales staff / 9:45 – 12:00 Noon Walk-Around training with Floor Manager and sales staff / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. 5:00 p.m. product knowledge overview, with sales staff and Floor Manager / 5:00 5:45 p.m. observe, listen to sales staff with customers and working deals with Kern. 5:45 – 6:00 p.m. Review Q&A Floor Manager.

DAY 2: 8:30 – 8:45 a.m. review with Floor Manager / 8:45 – 10:45 a.m. trade walk and trade drive with sales staff and Floor Manager / 10:45 – 12:00 Noon Walk – Around with sales staff and Floor Manager / 12:00 Noon – 1:00 p.m. Lunch / 1:00 p.m. - 5:00 p.m. review and drive preowned vehicles with Floor Manager / 5:00 – 5:45 p.m. Time with Kern / 5:45 – 6:00 p.m. review and Q&A with Floor Manager.

DAY 3: 8:30 a.m. – 8:45 a.m. review with Floor Manager / 8:45 a.m. – 12:00 Noon Product knowledge / 12:00 – 1:00 p.m. Lunch / 1:00 – 3:00 p.m. CRM review, entire sales process with Tim / 3:00 – 4:00 p.m. art of working the deal / 4:00 – 5:45 p.m. Sell me a Car, from meet and greet / 5:45 – 6:00 p.m. review and Q&A with Floor Manager

DAY 4: 8:30 – 8:45 a.m. review with Floor Manager / 8:45 a.m. 12:00 Noon a.m. test drive and why so Important with sales staff and Floor Manager / 12:00 Noon – 1:00 p.m. Lunch / 1:00 - 4:00 p.m. Working a deal at the sales desk - role play, finding objections and overcoming them, asking for their business Tewart training and Floor Manager / 4:00 – 5:45 p.m. shadow sales staff with customer / 5:45 – 6:00 p.m. review and Q&A with Floor Manager

DAY 5: 8:30 – 8:45 a.m. review with Floor Manager / 8:45 – 12:00 Noon Product knowledge and art of the test drive / 12:00 – 1:00 p.m. Lunch / 1:00 – 2:00 p.m. coming to the desk to work a deal, with Mgr, what is needed review / 2:00 – 3:00 p.m. CRM review, loading and pulling all forms with Mgr / 3:00 – 5:00 p.m. shadow / 5:00 – 5:45 p.m. Review from meet and greet to F&I / 5:45 – 6:00 p.m. Weekly Close-out with Sales Managers and Floor Manager

