# Business Technology Manager – 90 Day Orientation Plan

(NEW BTM) – [Start Date] Start Date

## Overview of Milestones for the next three quarters:

Each of the milestones we intend to follow the "See, Do, Teach" method which will validate that you have acquired the competency to operate autonomously for each step/stage through the first 9 months. Key milestones are identified below:

### First Quarter (Q1):

One-on-One's will be joint with Chris and Nate (as we are both able to attend).

### First 30 Days – End of Feb

* Be able to Tell the Mytech Story – Share with Chris & Nate for alignment
* Completion of Initial Mytech Sales Tools Training (ConnectWise, CW Sell, HIPAA Health Center, KnowB4, & Mytech U Webinars)
* Completion of Initial Vendor Training – Dell & SonicWall
* Completion of Shadow/Position Sessions – See list below…

### 60 Day Milestones – End of March

* Proficient at preparing Quarterly Business Review Documents & Lifecycle Management
  + Reports
  + Plans
  + Proposals – 2/3rds + of Clients with proposals for Win7 – Win10 upgrades
* Value Proposition for Hot Spare PC’s, and Value Select Deployment
* Product Training and Best Practices Value Map
* Be able to Explain the Existing Managed Services Programs:
  + Basic & Essential Care – legacy programs
  + Smart Business Suite & Co Managed IT – new/current programs
* Activity, Opportunity & Ticket Accountability

### 90 Day Milestones – End of April

* Participate in Major Account Client Meetings/Calls
* Attend at least ONE First Meeting with Chris
* Identify Target clients for transition to you – Chris & Joni collaboration
* Develop Competency in Sales Process as Opportunities Progress Through them

\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*We will review the rest of the targets/milestones after 90 Days\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*

### Q2 2019 Targets – End of June

* Begin Participation in Target account QBR & Other meetings (See Chris Lead)
  + Begin leading the internal follow up effort that is required post Client meetings.
* Proficient at executing Account Coordinator related tasks
* Develop Competency in Sales Process as Opportunities Progress Through them
* Vendor & Other Training – To be Identified

### Q3 2019 Targets – End of September

* Lead Quarterly Business Reviews for Accounts Assigned to you (Do – or Mutual Execution)
* Develop Competency in Sales Process as Opportunities Progress Through them
* Vendor & Other Training – To be Identified

### Q4 2019 Targets – End of Year

* Lead Quarterly Business Reviews for Accounts Assigned to you (Do/Teach – Chris Observe)
  + Target is that you feel confident and competent to lead the QBR Sessions
* Develop Competency in Sales Process as Opportunities Progress Through them
  + Should be able to autonomously drive clients through the sales (S2P Project) process by end of Q4. This does not mean that we stop leveraging team selling, however you should be able to execute solo through the sales process.
* Vendor & Other Training – To be Identified

## First Two Days Schedule:

### Monday:

8am – 11:30am: Belva

* Introduction to Mytech Partners
* HR Paperwork (as much as you can)
* Tour of office
* Get situated at your desk
* Familiarize yourself with tools/credentials and log in
* Learn to use Phones
  + Set up Voice Mail.
  + Dial Out Rules
  + Internal Address Book (Outlook)
  + Headset, Use, Park, Hold, Conference
* Start ConnectWise (CW) training

11:30am – 1pm: Sales Team Lunch n Learn

1pm – 2:30pm

* Continue getting situated at your desk
* Continue CW training
* KnowB4 training etc.

2:30pm – 3:30pm

* Meet with your Mytech Buddy – Anjali

3:30pm – 5pm

* Continue CW and other training
* Or other initial items on your list

### Tuesday:

8am – 9am:

* Continue CW and other training
* Or other initial items on your list
* Familiarize yourself with [Leadership Development site](https://mytechpartners.sharepoint.com/LeadershipDev/SitePages/Home.aspx)

9am – 10am

* Weekly Sales Team Meeting

10:15am – 11:15am

* Meet with Nate & Chris

11:30am – 12:30pm

* Culture Team Orientation - Lunch will be provided

12:30pm – 3pm

* Watch [Mytech Business Plateau’s on SharePoint Leadership Development Site](https://mytechpartners.sharepoint.com/LeadershipDev/Lists/Video%20Links/DispForm.aspx?ID=2&e=BoSIIo)
* Continue Training

3pm – 4pm

* Make a Difference Orientation with Day James

4pm – 5pm

* Connect with Nate before end of day – review next week

### Wednesday – Jan 23rd:

8:00am – 11:30am

* Continue CW Training, and/or Recorded Content Referenced Below

11:30am – 1pm

* Lunch with Chris & Tommy

1:30pm – 2:30pm

* Meeting with Stephanie in Marketing & Communications
  + Please review role, marketing content online and collateral

2:30pm – 5pm

* Continue CW Training, and/or Recorded Content Referenced Below

### Thursday – Jan 24th

8:15am – 9:45am

* Introduction to Mytech Process – with Michael Frascone
  + Note: You may want to schedule additional time as there are lots of processes to learn AND you may not feel that you got a total feel to cross off the “Shadow Session” goal

10am – noon

* Continue CW Training, and/or Recorded Content Referenced Below

Noon – 1:30pm

* Lunch with Ashlee

1:30pm – 2:30pm

* Shadow Ashlee – she started as an Account Coordinator and knows our systems very well. Please have her go through how she leverages ConnectWise and Quosal/Sell

2:30 – 5pm

* Continue CW Training, and/or Recorded Content Referenced Below

### Friday January 25th

8:30am – 10am

* Shadow Session & Training on Account Coordinator Role with Tommy

10am – 11:30am

* Continue CW Training, and/or Recorded Content Referenced Below

11:30am – 1pm

* Lunch with Anjali (Mytech Buddy)

1pm – 5pm

* Complete Dell Training – You will receive an email from me with more details and log-in information before Friday.

### Monday January 28th:

8am – 9am

* Continue CW Training, and/or Recorded Content Referenced Below

9am – 10am

* Call Andrea Jones on Teams and please review the following – share screens preferably:
  + Expense Reports
  + Mytech’s AR Methodology
  + Connect Booster Payment Portal
* Andrea does make it up to the MN office on a regular basis – you might want to find time to connect with her when she is up here too.

10am – noon

* Continue CW Training, and/or Recorded Content Referenced Below

Noon – 1:30pm

* Lunch on your own or find another teammate to meet!

1:30pm – 2:30pm

* Meet with Mae Sheryak for a Shadow session and an overview of the finance team, and how you as a BTM can most effectively work with the Finance Team and set them up for success.

2:30pm – 5pm

* Continue CW Training, and/or Recorded Content Referenced Below

### Tuesday Jan 29th

8am – 10am

* Continue CW Training, and/or Recorded Content Referenced Below

10am – 11am

* Meet with Dustyne regarding the Project Team and the Project Management Role.

11am – noon

* Continue CW Training, and/or Recorded Content Referenced Below

Noon – 1:30pm

* Potential Lunch with Jason Rood (GM). Please confirm he is available before this time – thanks!
* Jason has played nearly every role at Mytech – he is a wealth of knowledge, and an amazing person.

1:30pm – 5pm

* Continue CW Training, and/or Recorded Content Referenced Below

### Wednesday January 30th

8:30am – 9:30am

* Meet with Chris to review how the two of you can and will work together leveraging Activities, Opportunities and Tickets.
* Please reference documentation located [here](https://mytechpartners.sharepoint.com/sites/AllSalesDiscussions/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2Fsites%2FAllSalesDiscussions%2FShared%20Documents%2FActivity%20%26%20Opportunity%20Management&FolderCTID=0x012000E3F6F65B477F0B408F15B9C2B464B967&View=%7BD1148DCB-2D53-471F-B376-B3A2D3944545%7D)

8am – 8:30am NEA & Patti

* Check in Day 5, Q&A

9:30am – Noon

* Continue CW Training, and/or Recorded Content Referenced Below

Noon – 1pm Lunch on your own….

1pm – 1:45pm

* Meet with Sara O’Sullivan to have her review role; how to submit support requests via the Mytech HELP Center, and have her SHOW you what some of our physical infrastructure looks like:
  + Firewall
  + Switch,
  + Server & SAN
  + Wireless Access Points
  + UPS
  + Cable Management, etc.

2:00pm – 5pm

* Continue CW Training, and/or Recorded Content Referenced Below, or Complete Dell Training no later than today.

### Recorded Content to Watch – Check with Stephanie if the links don’t work (we are in the midst of transferring them to a new host).

* [Mytech Business Plateau’s on SharePoint Leadership Development Site](https://mytechpartners.sharepoint.com/LeadershipDev/Lists/Video%20Links/DispForm.aspx?ID=2&e=BoSIIo)
* [Executive Summary Report Client Video](https://blog.mytech.com/blog/2017-2d)
* Mytech U Sessions can be found here – please watch at least the ones listed below and can be found here: <https://mtpblog.mytech.com/mytechu/>
  + 4 Ways to Start Leveraging SharePoint
  + 25 Microsoft Office 365 Tips & Tricks
  + O365 – 4 Tools you are already paying for, but not using
  + Empower & Protect your Team – SecureWorker:
  + SaaS Panel – Good tips from Clients:
  + Productivity & Mytech Best Practices Value Map:
  + 7 Layer Security Dip
  + People – The Social Engineer's Dream
  + The Human Firewall
  + Make IT Easy
  + Avoid Process Development Pitfalls
  + How do you measure value from your Vendors?
  + Overlooked Infrastructure – Desktops & Laptops
  + Why This Cloud & Why Now? Century Link Partnership
  + How Mytech Patches our Clients Devices
  + Review of our Mytech HELP Client Portal

### Review Leadership Development Site Content

* [Reference the Site on the Mytech SharePoint Site here](https://mytechpartners.sharepoint.com/LeadershipDev/SitePages/Home.aspx)

### Shadow Sessions (first thirty days):

The goal of these sessions is to understand the different roles in the organization. This will help you navigate the different requests that you will receive from prospects and clients, as well as to be able to describe the nuances of what we do. The key objectives are for you to understand how these roles use ConnectWise, what processes impact them, what roles hand them information and what roles do they hand-off work to. As an outside sales professional knowing all key roles in the organization, developing relationships with them, and being able to set them up for success will help you serve your clients. Also work to ask each team member how YOU can make their role easier and set THEM up for success! Please coordinate time to spend 30 min to 1 hour with the different Mytech team members below in the first 30 days.

* Process – Michael Frascone
* Marketing – Stephanie Kingslien
* Service Desk Management – Nathan Abernathy
* Culture/Recruiting – Day James
* Sales Engineering – Andy Brogan
* Shared Technical Services (Network Operations Center) – James Motz
* Projects/Client Onboarding – Dustyne
* Depot – Jeremiah Jary
* Help Desk – Bob Ess
* Service Coordination – Toby Nelson
* Purchasing/Receiving – Jill Fox
* SonicWall Upgrade & Renewals Program (often referred to as Concentrix) – Cam Ophus
* Accounting Department Manager – Mae Sheryak
* AR & Expense Reports – Andrea Jones
* General Manager – Jason Rood

### Mytech Checklist for various Training Topics to Cover:

* Managed Services Programs
  + Current/Legacy Programs
  + Smart Business Suite & Back Office
  + CoManaged IT (CoMIT)
* CRM Activities
  + Understand the different Activity Types
  + Understand the different Activity Status'
* Sales Activity Training – executing the Activities:
  + Ask for Referral
  + Networking Event
  + First Meeting vs. Meetings
  + Call, vs. Email, vs. Follow Up, vs. Task
  + Follow Up and Closing Techniques
  + Quarterly Business Reviews
  + Brightgauge
* Opportunities
  + How to associate with Activities
  + Understand Opportunity Types
  + Understand Sales Stages
  + Understand Forecast Types
  + Pipeline Management Expectations
    - ConnectWise
    - Brightgauge
* Sales Tickets – associate with Opportunity and Activity
  + Understand Sales Board Status
  + Ticket is the Token
  + Understand Ticket workflow
* ConnectWise Navigation
  + ConnectWise Today
  + Custom Links on the Today Screen
  + Company Finance Information
  + Service Tickets/Service Boards
  + Sites
  + Configurations
  + Contacts
* Client Reporting
  + Executive Summary Report
  + SecureWorker Score
  + Firewall Reports
  + Spam Filter Reports
* Finance/Accounting
  + Payment Options & Process
  + Extension of Net Terms (what it means and how to apply)
  + ConnectBooster Online Payment Portal
* Marketing Initiatives and Activities
  + The importance of Adding Contacts to Marketing Groups:
  + Tracks in CW
  + Communication Rhythm
    - Newsletters
    - Events
    - Mytech U
  + Lead Generation Activities
    - Google AdWords
    - SEO
    - TeleSales
  + Campaigns for Opportunities
* Sell/Quosal Training
  + Use ConnectWise Test Company to practice making quotes/proposals
  + Agreement Proposals
  + Project Proposals
  + Transactional Quotes
  + Order Porter – online approval portal
  + DocuSign – Required for Agreement signatures
* Managed Services Signing Bonus Form
* Above the Line – Philosophy
* Navigating the Sales Drive (we are in the process of re-defining this file share vs. SharePoint & reorganizing)
* First Meeting Methodology
  + Asking Great Questions during a First Meeting
  + First Meeting Follow Up Checklist
  + The incredible value of a First Meeting Follow Up Email & Plan
  + First Meeting Feedback Form – SharePoint
* High Level of the Sales to Project Process (S2P)
  + Sales Stages Defined
  + What Activities are required at different stages
  + What approvals/collaboration are required
* Expense Reporting
  + Understanding how to enter them & requirements
  + The submission deadline, approval process, and receipt of reimbursement
* HIPAA Training Courses
  + HIPAA Health Center – for internal Training
  + HIPAA Health Center – can be referred to our Medical Clients
* Shared Technical Services & Network Operations Center
  + Remote Monitoring & Management (RMM) - N-Able Training
    - Patching Methodology
    - Automation/Scripting
    - Alerting
  + Cisco Umbrella
  + Backup Solutions
    - Datto
    - Max Backup – Server
    - Client Basic and Advanced (File & Image) Solution
    - O365 Backup
  + Network Monitoring/Managment tool - Auvik
  + Anti-Virus/Anti-Malware – Webroot
  + Intelligent Threat Detection & Security Operations Center (SOC) - Huntress
* Mytech Process Site
  + Understanding how to navigate the process site
  + Knowing how to submit a process change request
  + Familiarity with Key Processes
    - Sales to Project (S2P)
    - Help Desk/Service Coordination, HD Teams
    - New Client Onboarding
    - Procurement
    - Project Execution
    - Baseline Documentation
* Mytech SharePoint Site – Explore Content
  + We are actively working to utilize SharePoint more – FYI.
* Sales Engineering
  + SE Spreadsheet
  + Project Statement of Work Template
  + Business Questions
  + Familiarize yourself concepts associated with Mytech Best Practices Value Map: [www.mytech.com/bestpractices](http://www.mytech.com/bestpractices)
* Product Training
  + Firewall
  + Remote Access
  + Physical Servers & Virtual Servers
  + Virtualization - Hypervisors
  + Infrastructure as a Service (IaaS)
  + Microsoft Azure
    - O365/CSP
  + Uninterruptable Power Supply (UPS)
  + Switching
  + Wireless
  + Low Voltage Cabling (we refer or subcontract)
  + SAN/NAS
  + Backup Solutions
  + Cable Management/PDU's
  + Fixed Fee Services vs. T&M, and/or Phased Projects
  + PC's, Laptops, Thin Clients
* Training for the Following Vendor Partners – Separate login access will be provided:
  + SonicWall
  + Dell
  + Cisco
  + VMware
  + Lenovo
  + Microsoft – you are probably familiar with them - plrease review licensing and O365 plans
  + Meraki
  + APC
* Primary Distribution Partners:
  + Ingram Micro - We procure the majority of licensing and hardware from them
  + Synnex – Our Microsoft Cloud Service Provider (CSP) Business Goes through them