# Business Technology Consultant/Advisor – 90 Day Orientation Plan

Rep Name – ENTER 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:

One-on-One's will be with Nate. We will have you join the sales team training and meetings right away starting the week of Feb 4th.

### First 30 Days:

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

### 60 Day Milestones:

* Proficient at Holding First Meetings
* Product Training and Best Practices Value Map
* Be able to Explain the Smart Business Suite & Co Managed IT
	+ Also understand legacy programs for reference Basic & Essential Care
* Activity, Opportunity & Ticket Accountability
* Develop Competency in Sales Process as Opportunities Progress Through them
* Present Go To Market Plan through end of 2019 to Team
* Observe at least ONE Quarterly Business Review from Chris, Corey & Nick

### 90 Day Milestones:

* Sales Pipeline Building
* Set and perform at least 6 First Meetings with Prospects
* Identified Association Engagement
* Develop Competency in Sales Process as Opportunities Progress Through them
* Observe any New Client Strategic Roadmap Sessions if schedule allows

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

### Second Quarter

* Targeting at least 4 New Prospects that will make a decision for Managed Services in Q2
* Develop Competency in Sales Process as Opportunities Progress Through them

### Third Quarter

* Participate in Strategic Business IT Roadmap Sessions & Initial QBR's for New Accounts acquired in Q2
* Develop Competency in Sales Process as Opportunities Progress Through them
	+ Should be able to autonomously drive prospects through the sales process by end of Q3. This does not mean that we stop leveraging team selling, however you should be able to execute solo through the sales process.

## First Week Schedule:

The first week is well defined to get you started and acquainted with the organization. After which, we will be checking in during weekly one-on-one sessions to continue training and closing the gaps.

### Friday Feb 1st:

8am – 9am Mytech MN Branch Team Meeting

* Introduction to team, tour of office. Overview of training plan.

9am – 12:30am

* Connect with Belva (HR) and she will walk you through initial paperwork.
* Tour & Introduction to staff around the office
* Get logged into computer, and key applications
* Learn to use Phones
	+ Set up Voice Mail.
	+ Dial Out Rules
	+ Internal Address Book (Outlook)
	+ Headset, Use, Park, Hold, Conference
* Get situated at your desk

12:30 – 2pm

* Lunch with Nate
* Mytech Company History & Strategy Discussion, Q & A

2pm – 4:45pm

* Get logged into systems, learn how to use the phone
* Get situated at your desk
* Update LinkedIn Profile – suggested…
* Begin ConnectWise (CW) University & Other Training (Note if you have recently taken CW University courses that will register at ConnectWise we can pull those over to your Mytech account, if not, please take the courses as outlined.

4:45pm – 5pm

* Check out & See you on Monday!

### Monday Feb 4th

7:45am – 8am

* Check in with Nate briefly

8am – 11:30am

* Continue Training Coursework – All

11:30am – 1pm – Lunch provided

* Sales Team Training – main conference room
* Explore & familiarize yourself with tools noted on Credential document
* Get situated at your desk

1:00 – 2pm

* Continue Training Coursework – All
* Finalize HR paperwork – if needed/possible

2pm – 3pm

* Jason & Collin - Connect & Discuss GM Role, History & 2019 Plan

3pm – 5pm Solo

* Continue Training Coursework - All

### Tuesday Feb 5th

8am – 8:45am

* Overview of Onboarding Plan & Milestones
* Schedule One-on-One Sessions for next 90 Days

9am – 10am

* MN Sales Team Meeting

10am – 11:30am Solo

* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

11:30 – 1pm Lunch

* With Ashlee – Business Technology Manager

1:00pm – 5pm Solo

* Reach out to network…
* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

### Wednesday Feb 6th

8:00 – 8:30am NEA

* Check in & Review Day 3

8:30 – 11:30am Solo

* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

11:30am – 1pm Lunch

* Connect with Tommy & Joni

1pm – 3pm Solo

* Reach out to network…
* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

3pm – 4pm – Day James

* Make a Difference Orientation

4pm – 5pm

* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

### Thursday Feb 7th

8am – 10am – Event Workshop

* Join the team in the main conference room as we cover ‘The Most Boring Workshop Ever!’ Lifecycle Management

10am – 12noon Solo

* Reach out to network…
* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

12:00 noon – 1:30pm Lunch

* With Corey Falls Business Technology Consultant

1:30pm – 3pm Solo

* Reach out to network…
* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

3pm – 4pm Michael Frascone

* Process Overview

4pm – 5pm Solo

* Review week, review content, and connect with Network etc.

### Friday Feb 8th

8am – 8:30am NEA

* Check in Day 6, Q&A

8:30 – 10am

* Activity, Opportunity & Ticket Management Training

10am - 11:30am Solo

* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

11:30am - 1pm Lunch with Dean @ Mytech

1pm – 5pm Solo

* Continue CW Training, Dell, SonicWall, HIPAA Training and/or Recorded Content Below

\*\*\*\*\*\*\*\*\*\*\*\*\*End of Daily built out Schedule – but additional training below is scheduled into the following days/weeks\*\*\*\*\*\*\*\*\*\*\*\*\*

### Tuesday Feb 12th

3:30pm – 4:30pm

* First Meeting Training Details Overview

### Thursday Feb 14th

12:30pm – 2pm

* Networking Events Training & Association Engagements

### Friday Feb 15th

2pm – 3:30pm

* Agreement Training – Existing & New Programs
* Review of Documentation & Collateral

### Recorded Content to Watch

* [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://www.mytech.com/blog/2017-2d)
* Mytech U Sessions can be found here – please watch at least the ones listed below: <https://blog.mytech.com/tag/mytech-u>
	+ 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
* All Sales Team Training Recordings
	+ [June 17th 2019 – SBS & Strategic Insight & Risk Overview (SIRO)](https://web.microsoftstream.com/video/0ed7fb18-e83c-484f-9085-8b6071c782f2)
	+ [July 1st 2019 - Financial Payment Options, Marketing Visibility (Hubspot) & Onboarding/Offboarding checklists](https://web.microsoftstream.com/video/c87b611b-9397-4c20-b9b7-de5536dfc546)
	+ [June 3rd 2019 Fiduciary Information Security Assessment (FISA)](https://web.microsoftstream.com/video/4797910a-ef03-4abf-9e21-e0206fe3e5cf)
	+ Reference the All Sales Team General & Training channel for training

### 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 Kruse
* Depot – Jeremiah Jary
* Help Desk – Bob Ess
* Service Coordination – Toby Nelson
* Purchasing/Receiving – Jill Fox
* Accounting Department Manager – Aaron Winter
* AR & Expense Reports – Andrea Jones
* General Manager – Patti Gustafson/Jason Rood

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

* Managed Services Programs
	+ Current/Legacy Programs
	+ Smart Business Suite
	+ 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 - please review licensing and O365 plans
	+ Meraki
	+ APC & Eaton
* 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