



# Swartz Contracting On Boarding Program



## **BUSINESS DEVELOPMENT**

TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
<b>Phase I - HR/INTIAL HIRING</b>					
ORIENTATION					
-HR Paperwork	SEI Process	Day 1			
-Job Description	SEI Process	Day 1			
-Company Profile	SEI Process	Day 1			
Mission	SEI Process	Day 1			
Goals	SEI Process	Day 1			
Values	SEI Process	Day 1			
Organizational Chart	SEI Process	Day 1			
-Introduction to Staff	SEI Process	Day 1			
-Tour of Buildings	SEI Process	Day 1			
-Time Sheet	Personal Productivity	Day 1			
-Email	Personal Productivity	Day 1			
GOOGLE CALENDAR	Personal Productivity	Week 1			
EMPLOYEE MANUAL	SEI Process	Week 1			
PAPER TRAIL	SEI Process	Week 1			
PHONES	SEI Process	Week 2			
Computer Setup/Training	SEI Process	Week 2			
Server (photos and shared docs)	SEI Process	Week 2			
Network Marketing (Overview)	SEI Process	Week 2			
Event Marketing (Overview)	SEI Process	Week 2			
CE Educational Marketing (Agents & Fire Depts) (Overview)	SEI Process	Week 2			
SEO & Social Media Program (Overview)	SEI Process	Week 2			
Develop New & Increase Existing Revenue Streams (Overview)	SEI Process	Week 2			



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DASH View Marketing (Overview)	SEI Process	Week 2			
DASH TRAINING	SEI Process	Week 2-3			
-Contacts	SEI Process	Week 2-3			
-Dates	SEI Process	Week 2-3			
-Photos	SEI Process	Week 2-3			
-Documents	SEI Process	Week 2-3			
-Notes	SEI Process	Week 2-3			
-Reports	SEI Process	Week 2-3			
-Dashboard	SEI Process	Week 2-3			
-Marketing Information	SEI Process	Week 2-3			

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*Signee's Printed Name*

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*Signee's Signature*

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*Date of Sign Off*



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TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
<b>Phase II - TRAINING</b>					
Field Jobsite Training (All categories)	SEI Process	Week 3-4			
Business Development Direct Marketing Training	SEI Process	Week 5-6			
-Agent	SEI Process	Week 5-6			
-Adjusters	SEI Process	Week 5-6			
-Insurance Companies	SEI Process	Week 5-6			
-Agents, Adjusters, FD, etc.	SEI Process	Week 5-6			
-Fire Departments	SEI Process	Week 5-6			
-Past Customers	SEI Process	Week 5-6			
-Water Campaign	SEI Process	Week 5-6			
-Coml Emergency Assist Program	SEI Process	Week 5-6			
Ride Alongs on Assigned Categories (Weeks 8,10,12)	SEI Process	Weeks 8,10,12			
Sandler Sales Training	Certification	Start Week 1 - Ongoing			
90 Day Performance Review	SEI Process	Week 13			

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*Signee's Printed Name*

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*Signee's Signature*

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*Date of Sign Off*