



Swartz Contracting On Boarding Program



SALES ESTIMATOR

TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
Phase I - HR/INITIAL HIRING					
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			
-Email	Personal Productivity	Day 1			
GOOGLE CALENDAR	Personal Productivity	Week 1			
EMPLOYEE MANUAL	SEI Process	Week 1			
PAPER TRAIL	SEI Process	Week 1			
PHONE	SEI Process	Week 1			

Signee's Printed Name

Signee's Signature

Date of Sign Off



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Phase II - TRAINING					
DASH					
-Dates	SEI Process	Month 1-3			
-Photos	SEI Process	Month 1-3			
-Documents	SEI Process	Month 1-3			
-Notes	SEI Process	Month 1-3			
-Dashboard	SEI Process	Month 1-3			
-Online/Webinar Training	SEI Process	Month 1-3			
-Upload Reports from Xactimate	SEI Process	Month 1-3			
XACTIMATE BASIC ESTIMATOR					
-Write Estimate with Mentor Onsite	SEI Process	Month 1			
-Write Estimate on Own up to \$10k	SEI Process	Month 2			
-Write Estimate on Own up to \$20k	SEI Process	Month 3			
-Write Estimate on Own up to \$50k	SEI Process	Month 3-6			
-Scope Repairs	SEI Process	Month 1-3			
-Change Orders	SEI Process	Month 1-3			
-Supplements	SEI Process	Month 1-3			
COLLECTIONS	SEI Process	Month 2			
ITEL	SEI Process	Month 1-3			
BASIC WATER MIT - REETS 3 WATER MITIGATION JOBS	SEI Process	Month 1-3			
CERTIFICATIONS					
-Lead Based Paint	Certifications	Month 3-6			
XACTIMATE INTERMEDIATE ESTIMATE - \$50k-\$100k	SEI Process	Month 6-12			



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PROGRAM JOBS					
-Contractor Connection	SEI Process	Month 6-12			
-Symbility	SEI Process	Month 6-12			
-IMACC	SEI Process	Month 6-12			
XACTIMATE ADVANCED ESTIMATE - Up to \$100k	SEI Process	Month 12-18			
MARKETING - ADJUSTERS	SEI Process	Year 1			
TRAINING					
-Xactimate Level I	Certifications	Month 9-12			
-Xactimate Level II	Certifications	Month 12-18			
-Xactimate Level III	Certifications	Month 18-24			
-Subrogation I (IMACC)	Certifications	Month 18-24			
-Subrogation II (IMACC)	Certifications	Month 24-30			
-Sandler	Certifications	Start Week 1- Ongoing			

Signee's Printed Name

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