



Onboarding plan: PaintScout Estimator

Purpose: The purpose of this 4-week onboarding plan is to ensure the success of a new PaintScout estimator upon hiring and to give them the foundations to understand the painting industry and how to price projects. To be successful this should be paired with sales process training, company specific training, and daily mentorship.

Schedule

	Activities	Goal
Week 1	<p>Day 1:</p> <ul style="list-style-type: none"> - Review Painting Key Terms Glossary: <i>2 hrs</i> - Review every page of your company website (list your core differentiating factors and how those apply to sales): <i>2 hrs</i> <p>Day 2:</p> <ul style="list-style-type: none"> - Review Painting Key Terms Glossary: <i>2 hrs</i> - Do a competitive analysis on top 3-5 competitors using website and other online information available (services/business model/strengths/weaknesses): <i>2 hrs</i> <p>Day 3:</p> <ul style="list-style-type: none"> - Review Key Terms Glossary: <i>1 hr</i> - Create key products document: <i>3 hrs</i> - Review competitive analysis, your company notes, and key product document with supervisor: <i>1 hr</i> <p>Day 4:</p> <ul style="list-style-type: none"> - Learn internal systems - CRM/Project management tool: <i>2 hrs</i> - PaintScout training session: <i>2 hrs</i> <p>Day 5:</p> <ul style="list-style-type: none"> - Do key terms testing: <i>2 hrs</i> 	<ul style="list-style-type: none"> • Understand Key Painting Terms • Understand Paint, primer and other products your company uses • Understand the competitive environment • Understand your internal systems and other apps you use <p>Supplementary activities:</p> <ul style="list-style-type: none"> • Book a time with paint sales rep for product intro session • Work onsite with crew

<p>Week 2</p>	<p>Day 1:</p> <ul style="list-style-type: none"> - Read 3 project guides and take respective quizzes: <i>2.5 hrs</i> - Read “how to measure” document and learn how to use appropriate tools (laser measurer, tape measure, walking measures): <i>1 hr</i> - Practice building exterior estimates off of photos/dimensions - decks/fences/trim/siding: <i>2 hrs</i> <p>Day 2:</p> <ul style="list-style-type: none"> - Read 3 project guides and take respective quizzes: <i>2.5 hrs</i> - Follow exterior estimating guide 1 on PaintScout: <i>1 hr</i> - Complete 2 mock exterior estimates using the office and a home in the neighborhood: <i>2 hrs</i> <p>Day 3:</p> <ul style="list-style-type: none"> - Read 3 project guides and take respective quizzes: <i>2.5 hrs</i> - Follow interior estimate guide 1 on PaintScout: <i>1 hr</i> - Practice building interior estimates off photos/dimensions: <i>1 hr</i> - Review mock estimates made with estimator: <i>1 hr</i> <p>Day 4:</p> <ul style="list-style-type: none"> - Read 3 project guides and take respective quizzes: <i>2.5 hrs</i> - PaintScout training sessions: <i>2 hrs</i> <p>Day 5:</p> <ul style="list-style-type: none"> - Take estimating tests: <i>3 hrs</i> 	<ul style="list-style-type: none"> • Basics on how to evaluate prep process and times • How to evaluate issues in previous work • Basics of project production • How to measure a space • Learn how to estimate off photos <p>Supplementary activities:</p> <ul style="list-style-type: none"> • Listen to podcasts and read books on sales technique • Work onsite with crew
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<p>Week 3</p>	<p>Day 1:</p> <ul style="list-style-type: none"> - Read 3 project guides and take respective quizzes: <i>2.5 hrs</i> - Complete 2 mock interior estimates using the office and a local coffee shop: <i>2 hrs</i> - Review mock estimates made with estimator: <i>1 hr</i> <p>Day 2:</p> <ul style="list-style-type: none"> - Look at properties your company is quoting on Google maps and learn how to measure using that system. See “Measuring with Google Maps” if needed: <i>1 hr</i> - Complete 2 mock exterior estimates using Google maps on properties your company has done in the past and compare pricing: <i>2 hrs</i> - Shadow a company sales person virtually and with FaceTime: <i>2 hrs</i> <p>Day 3:</p> <ul style="list-style-type: none"> - Help with intake calls at front desk: <i>2 hrs</i> - Do a live ride along with estimator. Follow all estimates on PaintScout and take notes: <i>3 hrs</i> <p>Day 4:</p> <ul style="list-style-type: none"> - Do a live ride along with estimator. Follow all estimates on PaintScout and take notes: <i>3 hrs</i> - PaintScout training: <i>2 hrs</i> <p>Day 5:</p> <ul style="list-style-type: none"> - Work onsite with crew: <i>4 hrs</i> 	<ul style="list-style-type: none"> • Better understanding of building estimates • Learn the office role/ intake calls • Learn the sales estimating process • Understanding ball-park pricing • Learn how to estimate off Google Maps <p>Supplementary activities:</p> <ul style="list-style-type: none"> • Virtually shadow estimate process • Live shadow estimator • Work onsite with crew
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<p>Week 4</p>	<p>Day 1:</p> <ul style="list-style-type: none"> - Do a live ride along with estimator. Follow all estimates on PaintScout and take notes: <i>3 hrs</i> - Create 2 interior and 2 exterior mock estimates: <i>3 hrs</i> <p>Day 2:</p> <ul style="list-style-type: none"> - Do a live ride along with estimator. Follow all estimates on PaintScout and take notes: <i>3 hrs</i> - Re-do int/ext estimate for office, with other estimator acting as the customer: <i>1.5 hrs</i> - Practice making calls to provide ball-park pricing: <i>1.5 hrs</i> <p>Day 3:</p> <ul style="list-style-type: none"> - Do a live estimate: <i>2 hrs</i> - Review estimate with estimator: <i>1 hr</i> - Learn how to deal with difficult customers: <i>1 hr</i> <p>Day 4:</p> <ul style="list-style-type: none"> - Do live estimates: <i>3 hrs</i> - PaintScout training: <i>2 hrs</i> <p>Day 4:</p> <ul style="list-style-type: none"> - Do PaintScout basics to estimating final exam: <i>2 hrs</i> 	<ul style="list-style-type: none"> • Understanding Productions rates • Shadowing and mentorship process • PaintScout system • Understanding the painting process • Learning sales techniques more in depth • Learn how to deal with difficult customers <p>Supplementary activities:</p> <ul style="list-style-type: none"> • Live shadow estimator • Work onsite with crew
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