Marketing Outreach Coordinator
30/60/90 Day Plan

Onboarding a new employee is a process designed to integrate that employee into the company and its culture. It's also designed to familiarize them with the information and tools needed to become a productive team member.

It is Important to understand, this is only a guideline and you may need to make several changes but at least you'll have a starting point!

This plan is constructed to create a 30/60/90-day activity plan. Marketing Outreach Coordinator including, but not limited to, goals for the number of calls and appointments to be made each week and the weekly expectations for the first 90 days.

30 Days

Week One – month one

Day One

- HR training on benefits, paperwork, etc, with Office Manager.
- Setup Work area and get situated.
- Company tour including the introduction of staff.
- Reviewing and looking over company sales literature. Learning about the company to compile questions.
- Construct a list of questions to be asked about company, products and procedures.
- Meet with Service Representative to review PC and discuss how to use it.
- Set appointments with Service and Office Managers to learn about their roles in the company.
- Review Phone System Documentation, make test calls and practice making calls, transferring calls, and setting up conference calls. Logon to voicemail system and set up personalized voicemail. Logon to web portal and configure call treatments.

Training:

CRM (Exams are at the end of each session, you must pass all of them)

Course: Getting Started

Welcome to CRM. The purpose of our online learning is to provide a comprehensive overview of each module of CRM through the use of online courses, videos and exams. Approximately 1 hour.

Course: Basic Company and Contact

Learn about setting up your Companies (customers) and Contacts. Approximately 45 min.

CRM TV: Triple Partner Profits 9: Sales Consultant

Join Arnie and April as they dig into CRM best practices specific to the sales drivers in the organization. Learn the ins and outs of CRM for managing opportunities, tracking activities and much, much more (running time 1hr: 57min).

Course: Basic Sales
Learn about creating activities and opportunities and the sales process flow in CRM.

- Work with CRM after training to get a feel for it. Create a list of questions to be answered by the Sales Manager.

Day Two

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

Training:

CRM

Blueprint: Opportunity Flow
Learn about the business process flow of Opportunities.

Blueprint: Proactive Sales Flow
Learn about the business process flow of proactive sales.

Blueprint: New Account Management Flow
Learn about the business process flow of new account management.

Blueprint: Account Management Flow
Learn about the business process flow for Account Management.

Blueprint: Sales Order Flow
Learn about the business process flow of Sales Orders.

Blueprint: Time Entry Flow
Learn about the business process flow for Time Entry and Approval.

Blueprint: Time Approval Flow
Learn about the business process flow for approving timesheets.

Blueprint: Tracks Flow
Learn about the business process flow of Tracks.

Blueprint: Marketing Manager Flow
Learn about the business process flow of the Marketing Manager module.

- Work with CRM after training to get a feel for it. Create a list of questions to be answered by the Sales Manager.
- Meetings with Service and Office Managers.

Day Three

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

CRM TV: Triple Partner Profits 2: Customer Management
In this second show of the series, deep dive into customer management best practices. Tune in to learn more about how Marketing Manager, Tracks and Marketing Campaigns can automate you customer management process (Running time: 1hr and 3 min)

Partner Kit: Sales
Boosting sales activities is one of the best sure-fire ways to grow your business. Many companies do not know where to start. In this kit, CRM has assembled materials you can leverage to grow your business by supercharging your sales initiatives.

Recorded Webinar: Using CRM Sales Tracks

By implementing the CRM tracks feature set into your sales process, the automation possibilities are endless. Join us for an introduction the efficiencies that can be gained utilizing tracks. We'll discuss business cases appropriate for tracks, how to create a track and how to associate specific tracks to customer records. Learn how to 'keep the red out' in sales using tracks and to ensure that you always have forward momentum in the process, closing accountability loops between sales and service as won sales are handed off to the service team.

Day Four

- 9:00am – Target Marketing Training Session
- 1:00pm – Script building Training Session
- Meetings with Service and Office Managers.

Day Five

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- ½ Day spent with selected Service Manager shadowing and learning about the company's services and service processes.
- Construct a list of questions on missing information that has not been covered by ABC Inc.'s Staff.

Week Two – month one

Day One

8:00am – Product & Program Training Session 1
Start gathering sales lists and focus on a targeted community for prospects.

Day Two

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue gathering sales lists and focus on a targeted community for prospects.
- Produce a call list, review and practice scripts to introduce yourself.
- Build an introductory email

Day Three

- 8:00AM - Call Script Presentations, Sales List, and introductory email review
- 12:00PM – CRM Activities Training & Daily Report

Day Four

- 8:00AM - Call Script Presentations, Sales List, and introductory email review
- 1:00PM - Start calling and introducing oneself to businesses. Goal is to set up one appointment. Minimum requirement is to make 30 Phone Calls
- Submit Daily Report

Day Five

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 40 Phone Calls.
- Submit Daily Report

Week Three – month one

Day One

8:00am – Product & Program Training Session 2

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 40 Calls and send 40 Introductory Emails.
- Submit Daily Report

Day Two

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 Introductory Emails.
- Submit Daily Report

Day Three

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 Introductory Emails.
- Submit Daily Report

Day Four

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 Introductory Emails.
- Submit Daily Report

Day Five

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Gather sales lists and focus on a targeted community for prospects.
- Submit Daily Report

Week Four – month one

Day One

8:00am – Product & Program Training Session 3

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 40 Calls and send 40 other touches.
- Submit Daily Report

Day Two

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Three

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Four

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Five

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Gather sales lists and focus on a targeted community for prospects.
- Submit Daily Report

Week Five – month one

Day One

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Two

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Three

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Four

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Five

- Gather sales lists and focus on a targeted community for prospects.
- Submit Daily Report

60 Days

Week One – month two

Day One

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Two

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Three

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Four

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Five

- Gather sales lists and focus on a targeted community for prospects.
- Submit Daily Report

Week Two – month two

Day One

Report to Sales Manager for 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Two

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 60 Calls and send 60 other touches.
- Submit Daily Report

Day Three

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 30 Calls and send 30 other touches.
- Spend ½ of the day building ideas around other marketing ideas/techniques that you would like to try.
- Submit Daily Report

Day Four

- 9:00am – Presentation of new Marketing Ideas / Techniques
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 50 Calls and send 50 other touches.
- Submit Daily Report

Day Five

- Gather sales lists and focus on a targeted community for prospects.
- Submit Daily Report

Week Three – month two

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day working on new Marketing Idea

Week Four – month two

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day working on new Marketing Idea

Week Five – month two

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report

- Spend (1) ½ Day working on new Marketing Idea

90 Days

Week One – month three

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day **implementing** new Marketing Idea

Week Two – month three

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day **implementing** new Marketing Idea

Week Three – month three

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day **implementing** new Marketing Idea

Week Four – month three

- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.
- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day **implementing** new Marketing Idea

Week Five – month three

- Should be fully functional and on own making appointments and working with staff to produce meetings.
- Report to Sales Manager for Monday 9:00am meeting. This is a good time to ask questions. Good time to validate unanswered questions. Present update on new Marketing Idea.

- Continue calling and introducing oneself to businesses. Set up introductory appointment. Minimum requirement is to make 210 Calls and 210 other touches.
- Submit Daily Report
- Spend (1) ½ Day **implementing** new Marketing Idea

Do you have questions or need help with this tool? Send us an email at info@smarketingconnect.com. We are happy to answer your questions!