

90-Day Checklist

Days 1-30

<u>Initials</u>		<u>Description</u>	<u>Dates & Rating (1-5)</u>			
			Week			
<u>DM</u>	<u>IC</u>		1	2	3	4
_____	_____	Assign mentor	(name) _____			
_____	_____	Reviewed New Hire Training	_____	_____	_____	_____
_____	_____	Reviewed Mandash & MAT	_____	_____	_____	_____
_____	_____	Reviewed Crystal Reports	_____	_____	_____	_____
_____	_____	Reviewed Territory w/existing cust. base	_____	_____	_____	_____
_____	_____	Reviewed commission plan	_____	_____	_____	_____
_____	_____	Reviewed Products incl. partner products	_____	_____	_____	_____
_____	_____	Reviewed Pitch Book	_____	_____	_____	_____
_____	_____	Reviewed T & E Report	_____	_____	_____	_____
_____	_____	Reviewed monthly plan, set goals	_____	_____	_____	_____
_____	_____	Reviewed weekly plan & results (ea. week)	_____	_____	_____	_____
_____	_____	Witnessed 10 cold calls to dealers	_____	_____	_____	_____
_____	_____	Saw 10 sales presentations to dealers	_____	_____	_____	_____
_____	_____	Saw 10 service calls to dealers	_____	_____	_____	_____
_____	_____	Conducted Partner Presentation role play	_____	_____	_____	_____
_____	_____	IC introduced DM to 3 Dealer Principles	_____	_____	_____	_____
_____	_____	Reviewed 3 contracts w/IC	_____	_____	_____	_____
_____	_____	Have IC join Dealer/professional Assn's	_____	_____	_____	_____

_____ (DM sig) _____ (IC sig) _____ (RD sig)

Comments/Follow up:

90-Day Checklist

Days 31-60

<u>Initials</u>		<u>Description</u>	<u>Dates & Rating (1-5)</u>			
			Week			
<u>DM</u>	<u>IC</u>		1	2	3	4
_____	_____	Reviewed Territory w/ existing cust. base	_____	_____	_____	_____
_____	_____	Reviewed monthly plan, set goals	_____	_____	_____	_____
_____	_____	Reviewed weekly plan & results (ea. week)	_____	_____	_____	_____
_____	_____	Witnessed 8 cold calls to dealers	_____	_____	_____	_____
_____	_____	Saw 8 sales presentations to dealers	_____	_____	_____	_____
_____	_____	Saw 8 service calls to dealers	_____	_____	_____	_____
_____	_____	IC introduced DM to 5 Dealer Principals	_____	_____	_____	_____
_____	_____	Reviewed Pitch Book	_____	_____	_____	_____
_____	_____	Reviewed 3 contracts w/IC	_____	_____	_____	_____
_____	_____	Attended Manheim Auction w/IC	_____	_____	_____	_____

_____ (DM sig) _____ (IC sig) _____ (RD sig)

Comments/Follow up:

90-Day Checklist

Days 61-90

<u>Initials</u>		<u>Description</u>	<u>Dates & Rating (1-5)</u>			
			Week			
<u>DM</u>	<u>IC</u>		1	2	3	4
_____	_____	Reviewed Territory w/ existing cust. base	_____	_____	_____	_____
_____	_____	Reviewed monthly plan, set goals	_____	_____	_____	_____
_____	_____	Reviewed weekly plan & results (ea. week)	_____	_____	_____	_____
_____	_____	Saw 6 sales presentations to dealers	_____	_____	_____	_____
_____	_____	Saw 6 service calls to dealers	_____	_____	_____	_____
_____	_____	IC introduced DM to 5 Dealer Principles	_____	_____	_____	_____
_____	_____	Attend dealer event (launch lunch, golf)	_____	_____	_____	_____
_____	_____	Conducted Ad Ass'n Presentation role play	_____	_____	_____	_____
_____ (DM sig)		_____ (IC sig)	_____ (RD sig)			

Comments/Follow up:

Sales Call Details

Days 1-30

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____

Service Call Details

Days 1-30

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____
9. _____	_____	_____	_____
10. _____	_____	_____	_____



Comments/Follow up:

Sales Call Details

Days 31-60

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____

Service Call Details

Days 31-60

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____
7. _____	_____	_____	_____
8. _____	_____	_____	_____

Comments/Follow up:

Sales Call Details

Days 61-90

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____

Service Call Details

Days 61-90

<u>Dealership</u>	<u>Call Rating</u>	<u>Result</u>	<u>Date</u>
1. _____	_____	_____	_____
2. _____	_____	_____	_____
3. _____	_____	_____	_____
4. _____	_____	_____	_____
5. _____	_____	_____	_____
6. _____	_____	_____	_____

Comments/Follow up: