

FORGE

NEW REP ONBOARDING – CHECKLIST

1. Fill Out Roster tab of Blitz Sheet

- The blitz sheet link will have been sent to you directly
- Use your **full legal name**
- Make sure to fill out ALL info on the Roster tab
 - i. Blitz manager - The one person running the blitz
 - ii. Vet - An experienced salesman with 100+ installed deals
 - iii. Rookie - A salesman with less than 100 installed deals
- Direct manager - Your direct recruiter

2. Fill Out Flights/Travel tab

- Go to the **FLIGHTS/TRAVEL** tab at the bottom of the Google Sheets page

	Full Name	Phone Number	E-mail	Date of Birth	Position	Arriv:
3						
4						
5						
6						
7						
8						
9						
10						
11						

- Put in **all** info for the flight you purchased for the blitz
 - i. If you are driving, fill everything out but you can *ignore* columns D, E, I, and J

3. Fill Out Forge Onboarding Form

- Go to the **ONBOARDING** tab at the bottom of the Google Sheets page

ARRIVAL TO BLITZ						
Full Name	Driving/Flying?	Departing From	Airline + Flight # (Home -> Blitz)	Arrival Airport	Arrival Date	Arrival Time

Navigation bar: Roster | Flights/Travel | **Onboarding** | Scoreboard | +

- Link [here](#) and hyper-linked in the column named 'Forge Onboarding Form Completed' (click the blue text at the top of the column)
- Use your **legal name** and fill out the form
- **Check off the "Forge Onboarding Form Completed" box on your blitz sheet!**

4. Join Company Slack Channels

- Install the **Slack** app
- Link [here](#) and hyper-linked in the column named 'Slack Accessed' (click the blue text at the top of the column)
- You will automatically be added to the company-wide communication channels. Your direct manager will add you to your assigned blitz channels
- Make sure notifications are **ON**
- **Check off the "Slack Accessed" box on your blitz sheet!**

5. Fill Out Brightspeed Partner Onboarding Form

- The form is hyper-linked in the column named 'BS Onboarding Form Completed' (click the blue text at the top of the column)
- Include **your headshot**
- Double-check your information and submit (if you do not have a driver's license use a passport)
- **Check off the "BS Onboarding Form Completed" box off on your blitz sheet!**

6. Sign Background Check Agreement

- This will be sent to you in a text or email soon after you fill out the *BS Onboarding Form*
- Once signed...
- **Check off the "Background Check Completed" box on your blitz sheet!**

7. Complete BASS Compliance

- You will receive an email with your BASS login, you must login and complete the brief compliance form that pops up upon login
- After doing this, you will see a page that says your BASS is awaiting approval
- **Check off the "BASS Compliance" box on your blitz sheet!**

8. Log Into BASS

- Within 24-48 hours of completing BASS compliance, you will receive another email stating that your BASS has been accepted
- Once you receive this, log-in to confirm that your BASS is active and ready to be used on the blitz!
- **Check the “BASS Log-in” box off on your roster sheet!**

9. Log Into Spotio

- Download the *Spotio* app
- Enter your phone number to log in
- Enable **location** and **notifications**
- **Check the “SPOTIO Log-in” box off on your roster sheet!**

10. Notify your Direct Manager

- After all the above steps are completed, notify your direct manager that they are done
- **Your direct manager will review your onboarding and check off “Cleared to knock” once approved!**

CONGRATULATIONS

Once all of this is done, you are fully onboarded and ready to go.