In the next 30 days, please use this guide to mentor the new trainee. Each week you will be required to evaluate the progress made in the following topics. Please note that this is not a pass or fail method but a way to improve the trainee's comfort level in McLeod before transitioning to a sales role.

**SCALE OF 0 TO 2**

0- Needs improvement  
1- Satisfied  
2 - Excellent

**Week 1:**

* Building Loads: locations, bill-to, appointments, etc: \_\_\_\_\_\_\_\_
* Building multi stop loads appointments, adding details for each stop, etc. \_\_\_\_\_
* Building SOs: posting correctly, adding descriptions, etc: \_\_\_\_\_\_\_
* Checking SOs in McLeod (to see who it belongs to: \_\_\_\_\_\_\_
* Posting different equipment (F, SD, V, R, HS): \_\_\_\_\_\_\_
* Answering inbounds / making outbounds: \_\_\_\_\_\_\_
* Equipment Knowledge (F, SD, HS, V, R, / dims): \_\_\_\_\_\_\_
* Accessorial knowledge (tarps, straps, chains, coil racks, etc.): \_\_\_\_\_\_\_\_

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Week 2:**

* Checking MC#s: \_\_\_\_\_\_\_\_
* Do you know how to set up a carrier on GoHighway?
* Do you know how to source carriers through GoHighway? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Do you understand the assessment classifications? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Able to comprehend the Insight details? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Know how to set a carrier without and ELD connection with GoHighway? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Calling out on Mcleod available carriers / direct posted loads: \_\_\_\_\_\_\_
* Selling Loads: \_\_\_\_\_\_\_
* Marking a load in progress / delivered: \_\_\_\_\_\_\_
* Check Calls/ Filter Brokerage planning: \_\_\_\_\_\_\_
* Updating loads in McLeod: \_\_\_\_\_\_\_\_
* Reading / making Brokerage Planning Profile / Planning comments: ­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_
* Sending Tracking: \_\_\_\_\_\_
* Sending Rate Cons: \_\_\_\_\_\_\_\_
* Do you know how to use the "Source" tab in Parade to source carriers? \_\_\_\_\_\_\_
* Do you know how to accept/counter quotes through Parade when a carrier submits a quote? \_\_\_\_\_\_\_
* Do you know how to send a carrier the magic link for a load through Parade? \_\_\_\_\_\_\_
* Do you know what the "Smart Lanes" tab in Parade can be used for? \_\_\_\_\_\_\_
* Do you know how to generate a “to the truck” rate on Greenscreens? \_\_\_\_\_\_\_\_\_\_\_
* Do you know what does the “Network Rate Prediction” stand for on Greenscreens? \_\_\_\_\_\_\_\_
* Do you know what does the “Target Sell Rate” mean? \_\_\_\_\_\_\_\_\_
* Do you know how to find carriers on Greenscreens? \_\_\_\_\_\_\_
* Do you know how to request a bid from carriers on Greenscreens? \_\_\_\_\_\_\_\_\_\_

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Week 3:**

* Sending TONU: \_\_\_\_\_\_\_
* Adding detention: \_\_\_\_\_\_
* Obtaining PODs / sending to paperwork: \_\_\_\_\_\_\_
* Determining viable options on the phone (is it a backhaul, where are they getting unloaded etc.) : \_\_\_\_\_\_

Notes: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Mentor recommendations:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Training department recommendations:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mentor\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Trainee\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Trainer\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_