



## Retail Training Modules

Subject		Where	Good	Help
Who	Human Resources Module			
	Request Name Badges with City, State	From receptionist		
	1.45 Sales Team Compensation Plan	R:\1 About Benefits, Pay and Human Resources		
	1.5 Employee Center in NetSuite	R:\1 About Benefits, Pay and Human Resources		
	2.300 Whose Sale is it?	R:\8 About store Procedures		
	30-60-90 Day Review Sales Monthly Touch Base Forms	S:\00 Human Resources\03 Performance Management\Performance Reviews		
	9.5 Presidents Club	R:\8 About Store Procedures		
	0.1 Store Locations Map	H:\R Drive Editable Documents\0 About Leader's Holding Company Essentials\0.1 Store Locations Map		
	8.21 Territory Manager - Store Alignment Structure	R:\8 About Store Procedures		
Worksheets				
	Human Resources Training Module Quiz	R:\12 About Training and Quizzes\Training Modules\Human Resource Training Module		

	Subject	Where	Good	Help
Who	Leaders Essentials Workbook Module			
<b>Leaders Basics</b>				
	0.0 Eligibility to Earn Commission	R:\0 About Leader's Holding Company Essentials		
	0.2 History of Leader's	R:\0 About Leader's Holding Company Essentials		
	0.3 Mission Statement and Core Values	R:\0 About Leader's Holding Company Essentials		
	0.4.1 Team Philosophy	R:\0 About Leader's Holding Company Essentials		
	0.4.2 Customer Satisfaction	R:\0 About Leader's Holding Company Essentials		
	9.6 Community Matters Procedure	R:\8 About Store Procedures		
	9.7 Instagram Photo Reference Library	R:\8 About Store Procedures		
<b>Leaders Showroom</b>				
	0.6 Telephone Answering Policy & Cell Phone Etiquette	R:\0 About Leader's Holding Company Essentials		
	0.6.1 Store Phone Routing	R:\0 About Leader's Holding Company Essentials		
	0.7 Dress Code	R:\0 About Leader's Holding Company Essentials		
	0.8 Safety	R:\0 About Leader's Holding Company Essentials		
	0.2.3 Leaders Non-Negotiable Practices	R:\0 About Leader's Holding Company Essentials		
	0.01a Learning Ladder	R:\0 About Leader's Holding Company Essentials		
	1.4 Time Clock	R:\1 About Benefits, Pay and Human Resources		
	0.01 Finding Information & Searching	R:\0 About Leader's Holding Company Essentials		
	0.13 Stages of a Customer CRM Pipeline	R:\0 About Leader's Holding Company Essentials		
<b>NetSuite</b>				
	0.15 Logging In To NetSuite	R:\0 About Leader's Holding Company Essentials		
	2.01 Sales Closing Tools	R:\8 About Store Procedures		
	0.9 SKU Tags	R:\0 About Leader's Holding Company Essentials		
	4 About Easels, POP Signs, Pricing	R:\4 About Easels, POP Signs, Pricing		
	0.10 Introduction to NetSuite	R:\0 About Leader's Holding Company Essentials		
	0.11 NetSuite Terminology	R:\0 About Leader's Holding Company Essentials		
	0.12 NetSuite Symbols & Shortcuts	R:\0 About Leader's Holding Company Essentials		
	0.16 Standard NetSuite Configuration	R:\0 About Leader's Holding Company Essentials		
	0.17 Sandbox Training Environment	R:\0 About Leader's Holding Company Essentials		
	0.18 Stages of a Sale	R:\0 About Leader's Holding Company Essentials		
	0.19 Sales Team NetSuite Dashboard Overview (Beginner)	R:\0 About Leader's Holding Company Essentials		
<b>Worksheets</b>				
	12.45 Leader's Essentials Review	R:\12 About Training and Quizzes\Training Quizzes		
	12.46 NetSuite Essentials Review	R:\12 About Training and Quizzes\Training Quizzes		

	1.12 Leaders Essentials Checklist	R:\0 About Leader's Holding Company Essentials		
	<b>Subject</b>	<b>Where</b>	<b>Good</b>	<b>Help</b>
<b>Who</b>	<b>Material &amp; Products Module</b>			
	7.5 Do You Know About Aluminum?	R:\7 About Product, Vendors and Warranty		
	7.6 Do You Know About Powder Coat?	R:\7 About Product, Vendors and Warranty		
	7.31 Do You Know Marine Grade Polymer?	R:\10 About the Solutions Center (Service)\7.0 Vendor Information\Fabric, Cushions & Buttons		
	7.0 Time & Material What Determines Price	R:\7 About Product, Vendors and Warranty		
	Materials Review: Aluminum, Cast Aluminum, PoliSoul™, MGP (Re Cycled and Virgin) , Wicker Resin, Rattan	R:\7 About Product, Vendors and Warranty		
	7.12 Central Cushion	R:\7 About product Vendors and Warranty		
	7.13 Cushion Shop Flow Chart	R:\7 About product Vendors and Warranty		
	7.12.1 Central Cushion Rush	R:\7 About Product, Vendors and Warranty		
	7.14 Perfect Fit How To	R:\7 About Product, Vendors and Warranty		
	7.12.4 Embroidered Toss Pillows	R:\7 About Product, Vendors and Warranty		
	Solution Dyed Fabric Cleaning	R:\10 About the Solutions Center (Service)\7.0 Vendor Information\Fabric, Cushions & Buttons		
	Ownership Packets – Use Garden Classics™ as an Example	R:\10 About the Solutions Center (Service)\12.0 Ownership Packets		
	13 Umbrella and Rug Fitment Guide	R:\12 About Training and Quizzes\Training Modules\Material and Product Training Module		
	7.01.2 Vendor Codes	R:\7 About Products , Vendors and Warranty		
	2.301 Fabric Protection	R:\8 About Store Procedures\2.0 General Store Procedures		
	2.302 Fabric Protection Plus	R:\8 About Store Procedures\2.0 General Store Procedures		
	12.18 Showroom Visit & Training	R:\12 About Training and Quizzes\Training Modules\Material and Product Training Module		
	Meguiar's Tear Sheet			
	Corrosion Block Tear Sheet			
	12.8 Showroom Visit & Training			
	Heads up selling	Using the entire showroom to make a sale		

	Overcoming Price Objection	Present less expensive items in the same colorway (Less time and material), Present As-Is or damage		
<b>Worksheets</b>				
	Material and Product Training Module Quiz	R:\12 About Training and Quizzes\Training Modules\Material and Product Training Module		
<b>NetSuite Module I</b>				
	0.9 SKU Tag, SKU Format Review	R:\0 About Leader's Holding Company Essentials\SKU Tags		
	0.19 Sales Team NetSuite Dashboard Overview (Intermediate)	R:\0 About Leader's Holding Company Essentials		
	Easel Review - 4 About Easels, Floor Signs, Price Tags & Pricing	R:\4 About Easels, POP Pricing		
	2.0.1 The Customer Record	R:\3 About Customers and Orders		
	3.1.1 Convert an Opportunity to Quote to a Sales Order	R:\3 About Customers and Orders		
	3.1 Writing A Sale	R:\3 About Customers and Orders		
	2.01 Sales - Closing Tools	R:\8 About Store Procedures		
	3.3 Place Holder SKU	R:\3 About Customers and Orders		
	5.0 Take a Payment	R:\5 About Payments, Credits and Returns		
	5.1 How to Use the PAX Credit Card Reader	R:\5 About Payments, Credits and Returns		
	5.3 Check Policy	R:\5 About Payments, Credits and Returns		
	5.5 Gift Certificates	R:\5 About Payments, Credits and Returns		
	5.10 Exchanges Returns Credits	R:\5 About Payments, Credits and Returns		
	5.11 Refund	R:\5 About Payments, Credits and Returns		
	1.0 Certificate of Insurance Requests	R:\6 About Delivery, Shipping and Transfers		
	2.0 Scheduling Fulfillment	R:\6 About Delivery, Shipping and Transfers		
	2.2 Delivery and Transfer Schedule	R:\6 About Delivery, Shipping and Transfers		
	2.51 Solutions Center Service Case	R:\8 About Store Procedures\2.0 General Store Procedures		
	2.6 Freight Shipping Rates	R:\6 About Delivery, Shipping and Transfers		
	For common carrier shipments: Tables ship unassembled, the scheduled delivery date is the date the product is handed off to the the freight carrier			
	3.18 Customer Communication in NetSuite	R:\3 About Customers and Orders		
	NetSuite Module I Quiz	H:\R Drive Editable Documents\12 About Training and Quizzes\Training Modules\NetSuite Training Module 1		

<b>NetSuite Module II</b>				
	0.19 Sales Team NetSuite Dashboard Overview (Advanced)	R:\0 About Leader's Holding Company Essentials		
	7.00 Check Stock, Look Up Product	R:\7 About Product, Vendors and Warranty		
	2.1 Fulfill Deliver Update	R:\6 About Delivery, Shipping and Transfers		
	2.3 Schedule Change Cancel Fulfillment	R:\6 About Delivery, Shipping and Transfers		

	3.3 Ordering Parts & Custom Items	R:\Netsuite		
	3.5 Close a Sale	R:\3 About Customers and Orders		
	3.9 Cancel or Change Commitment Location	R:\Netsuite		
	3.18 Customer Communication	R:\3 About Customers and Orders		
	3.10 Commercial Partner Program	R:\13 About Commercial Partner Program		
	<b>Worksheets</b>			
	NetSuite Training Module 2 Worksheet	H:\R Drive Editable Documents\12 About Training and Quizzes\Training Modules\NetSuite Training Module 2		

	Subject	Where	Good	Help
Who	Showroom Operations Module			
	9.6 Community Matters Procedure	R:\8 About Store Procedures		
	1.0 Certificate Of Insurance Request	R:\6 About Delivery, Shipping and Transfers		
	2.2 Opening and Closing Checklists	R:\8 About Store Procedures\2.0 General Store Procedures		
	2.2.0 Make Deposit Reconcile Cash	R:\Netsuite		
	2.2.1 Cash Drawer Reconciliation Form	R:\Netsuite		
	2.110 Transfer Merchandise	R:\Netsuite		
	2.50 Clearance Locations by Priority for selling discontinued items	R:\8 About store Procedures\2.0 General Store Procedures		
	2.125 Damaged or Broken Goods	R:\8 About store Procedures\2.0 General Store Procedures		
	2.130 Incorrect Inventory Quantities	R:\8 About store Procedures\2.0 General Store Procedures		
	2.120 Inventory Control Tags (ICF Tags for Damaged Items)	R:\8 About store Procedures\2.0 General Store Procedures		
	8.1 Stores-Emergency Opening and Closing Procedure with Checklist	R:\Netsuite		
	8.26 Store Maintenance Guide	R:\8 About store Procedures		
	8.22 Cleaning Company Checklist	R:\8 About store Procedures\2.0 General Store Procedures		
	8.24 Landscaping and Curb Appeal Checklist	R:\8 About store Procedures\2.0 General Store Procedures		
	8.25 Windows Checklist	R:\8 About store Procedures\2.0 General Store Procedures		

	Subject	Where	Good	Help
Who	Showroom Skills Module			
	6.0 Dashboard Management - Review	R:\NetSuite		
	5.4 Wells Fargo QR Code Finance	R:\5 About Payments, Credits and Returns		
	6.15 Dispatch Track	R:\6 About Delivery, Shipping and Transfers		
	TraxSales <a href="https://etraxsales.com/Login.aspx">https://etraxsales.com/Login.aspx</a>	How the counts work		

	2.10 Online Reviews	R:\8 About Store Procedures		
	2.52 Customer Owned Merchandise CUSM	R:\8 About Store Procedures		
	2.53 Customer Owned Material COM	R:\8 About Store Procedures		
	4.1 Pricing Levels	R:\4 About Easels, POP Pricing		
	5.10 Exchanges Returns & Credits	Website review		
	5.11 Refunds	R:\5 About Payments, Credits and Returns		
	5.5 Gift Certificates	R:\5 About Payments, Credits and Returns		
	Showroom Skills Training Modules Quiz	R:\12 About Training and Quizzes		