Cheerleading Co-ordinator – Notes

**General:**

Hotmail: [cheerleadingco@hotmail.co.uk](mailto:cheerleadingco@hotmail.co.uk)

HP Laptop (PC3): PC3

Toshiba Laptop (toby): PC5

CeCe’s laptop: TriumphPC4

Internet – wireless access: see sticker on modem

**Hen parties – areas of responsibility**

1. Confirming receipt of payments
2. Respond to emails (hen party related)
3. Booking studios
4. Booking coaches
5. Sending payment chases and balance reminders
6. Sending coaches job sheets

Always reply to the last email so as to keep the email chain – NEVER START A NEW EMAIL!

**In order to respond to hen party emails, you need the following files open**

* Hen party status (beware – IF THIS OPENS IN READ ONLY, PLEASE CLOSE AND OPEN AGAIN. IF IT STILL DOES IT THEN SAVE IT with today’s date)
* HP email response templates
* HP workload record
* Studio status
* Venues nationwide

**In order to send a booking form & invoice you need the following files (in addition to the above):**

* Hen party booking form – template (select the one with the correct rate)
* INV template

**Responding to initial inquiries**

1. Enter the details on the hen party status (date of party, name, email, city, etc...)
2. Copy & paste the relevant response template into a reply email
3. Edit relevant sections of the response e.g. name of city, date, price / offer, timeslots etc)
4. Check the Venues nationwide doc to see what timeslots we do in that city then check the hen party status to see if any are already booked.
5. Re-read the email paying particular detail to the offer and making sure it is correct, as well as the city & timeslots. Then send it.
6. File the email away
7. Update the Hen party status to say ‘sent info xx/xx/xx date’
8. Update the HP workload record by adding the customer’s name under the inquiries column for that week.

**Responding to further questions & requests to pencil something in**

1. Update the details on the hen party status (e.g. xx/xx/xx date, mary jane asked for venue address & wants to reserve 4pm)
2. Copy & paste the relevant response template into a reply email (there are lots on the template including things like what to wear, what if someone is pregnant...and confirming a pencil etc)
3. If the person wants to reserve a slot, check the Venues nationwide doc to see what timeslots we do in that city then check the hen party status to see if any are already booked.
4. Edit relevant sections of the response e.g. date & timeslot for a pencil. And when they need to confirm by)
5. Re-read the email paying particular detail to the timeslot & deadline for response. Then send it.
6. File the email away
7. Update the Hen party status to say ‘pencilled in 4pm on xx/xx/xx date. This is held until xx/xx/xx date. Also told her about pregnant participants.’
8. At this point, since it is just a pencil you don’t need to worry about the studio bookings just yet (unless the party is in less than a month, or is in a particularly busy venue which gets booked up in advance like Pineapple). TBC!!!!

**Responding to request to book**

1. Enter the details on the hen party status *(xx/xx/xx date – she wants to book 4pm for 15 people*)
2. Check the Venues nationwide doc to see what timeslots we do in that city then check the hen party status to see if any are already booked.
3. Open hen party booking form – template
4. Save as ‘*hen party booking form – mary jane smith 12th nov 2011’*
5. Fill in the details (including dates etc in the terms & conditions)
6. Open INV template
7. Save as *‘INV??? – mary jane smith 12th nov 2011’*
8. Fill in the details (make sure amounts are correct and double check this.)
9. Copy & paste the relevant response template into a reply email
10. Edit relevant sections of the response e.g. name of city, date, price / offer, timeslots etc)
11. Attach the booking form & invoice docs
12. Re-read the email paying particular detail to the pricing info and making sure it is correct, as well as the city & timeslots. Then send it.
13. File the email away
14. Update the Hen party status to say *‘form & inv sent on xx/xx/xx date’* also update the payment column to say *‘INV??? £375’* (highlight yellow) and the venue column to say *‘xx venue, need to pencil’ (highlight yellow).* Please also highlight yellow the first column which has date, timeslot & party theme.
15. Update the HP workload record by adding 1 to the total of the bookings column
16. Update the studio booking to do list by adding the date & timeslot that you need to ‘pencil’
17. Enter the booking onto the hotmail calendar. Click on the date you want and click on ‘add’ then enter the following:
    1. WHAT: CITY (1st 3 or 4 letters only) - ? – Customer name – theme – party date
    2. WHERE: city
    3. Calendar: ‘HP booking stage’
    4. Start & end – fill in times
    5. Click on add more details
    6. No reminder
    7. Don’t invite anyone unless the party is in less than a month
    8. In the last section, write the number of people who are attending.

**Responding to receipt of booking form & payment.**

1. Enter the details on the hen party status *e.g form & £187.50 bacs received 5th oct (highlight green.* Please also highlight green the first column which has date, timeslot & party theme. Amend the venue column to say *‘xx venue, pencilled in xx/xx/xx date – now need to book’* and highlight red.Leave the INV??? £375 bit yellow (unless they have paid in full or paid a final balance in which case it can go green)
2. Update the studio booking to do list by adding the date & timeslot that you need to ‘book’ (if it is already there as a pencil just write – *now need to book* next to that entry.
3. Copy & paste the relevant response template into a reply email. If it is a deposit just send the confirmation of receipt, if it is a balance, send a good to go. Open phone numbers 2 to get the coach’s contact no.
4. Edit relevant sections of the response e.g. deadline for balance payment
5. Re-read the email paying particular detail to balance deadline / start time & location of the HP. Then send it.
6. File the email away
7. Update the hotmail calendar ‘HP booked’ if an entry is already there as a booking stage you just need to open it and change it to need to book. If it is not there you need to add a new one in.

**Sending balance reminders**

1. Every Tuesday, you need to send balance reminders to all parties with final payments coming up this Friday.
2. Check for any other info you need e.g. cheer info, phone number etc
3. Use the balance reminder template to send reminder (and request for any other info needed)
4. update the status to say ‘balance reminder sent xx/xx/xx’

**Sending balance chase**

1. if the balance was due on Friday and you’ve not received it by Monday, send the balance chase template
2. update the status to say sent balance chase & told her to pay by fri xx/xx/xx. Then highlight red the invoice details in the payment column and write overdue ie. Inv5475 £300. Overdue!
3. If you haven’t received a reponse by wed, phone the customer & send another chasing email. Also, let the coach know.

**Responding to receipt of final payment with g2g.**

1. Enter the details on the hen party status *e.g £187.50 bacs received 5th oct (highlight green.* Please also highlight green the invoice details in the payment column ie. Inv5475 £300.
2. Copy & paste the g2g (good to go) response template into a reply email. Fill in the details double checking against the status. Open phone numbers 2 to get the coach’s contact no.
3. Edit relevant sections of the response e.g. deadline for balance payment
4. Re-read the email paying particular detail to balance deadline / start time & location of the HP. Then send it.
5. File the email away
6. If you have time, update the hotmail calendar ‘HP booked’ if an entry is already there as a booking stage you just need to open it and change it to need to book. If it is not there you need to add a new one in. This is not urgent if you don’t have time – I can do it when I get back.

**Booking a coach**

Once a week (usually Thursdays) we have a coaches allocation meeting where we will send invitations to coaches for all parties being held within the next 3 months. We then write their name & the date the invite was sent in yellow in the coaches column on the status. E.g. Maxine 2nd mar

Whenyou get a response form a coach you need to change it to green & replace the date with the date it was accepted. E.g. Maxine 3rd mar

If the coach declines, write ‘their name’ & put unavailable in red font. E.g. Hannah unavailable

**Booking a studio**

Update the studio status as you go along. Once a week we have a status meeting to check that all of the actions are correct & to record responses from venues.

**Sending job sheets**

1. Once a final balance has been paid, you need to send a job sheet to the coach. They then need to phone you to read it through with you.
2. Open the correct job sheet (based on theme)
3. Use the status to fill in all of the details