

# Classroom Day Tools

## (IBP Orientation)

### Week 1

- ☐ Introduce to sales center associates & leaders
- ☐ Tour sales center, discuss safety & operational protocols
  - ☐ [Sales Center Tour Checklist](#)
- ☐ Brand education and merchandising videos (top 1-2 brands)
  - ☐ [Merchandising Video Library](#)
- ☐ DSDE merchandising standards best practices video & discuss
  - ☐ [Merchandising Best Practices Video](#)
  - ☐ [DSDE IBP Information](#) (deck)
- ☐ Review Article 4, 6, & 8
  - ☐ [Distribution Agreement](#)
- ☐ Review customer service expectations (including pull ups)
- ☐ Scan Based Trading (SBT) Introduction
  - ☐ [Scan Based Trading \(SBT\) Introduction](#)
- ☐ Handheld/RTM overview
  - ☐ [RTM Overview Video - 30 minute overview](#)
  - ☐ [RTM Training Guides - Additional 1-pagers optional resource](#)
- ☐ Order Welcome Kit (BBU Leader passcode: 5VPJR)
  - ☐ [Welcome Kit Link](#)
- ☐ Provide Aramark order information for additional shirts
  - ☐ [IBP Clothing Options & Aramark Order Form](#)
  - ☐ [Aramark Order Form](#)
- ☐ Provide samples of core products the new IBP will be distributing
- ☐ Request ION access for route New IBP purchasing
  - ☐ [ION Set Up Instructions](#)
- ☐ Provide contacts (OSL, MSL, SCL, etc)

### Week 2

- ☐ Provide Knowledge Check and Review
  - ☐ [Knowledge Check Week 1 Link](#)
- ☐ Scan Based Trading (SBT) Process
  - ☐ [Scan Based Trading \(SBT\)](#)
- ☐ Settlement Overview
  - ☐ When it is delivered
  - ☐ How to access
  - ☐ Analyst contact information
  - ☐ [Settlement](#)
- ☐ Supply Settlement 101 webinar
- ☐ ION navigation & functions - [ION Video 1 – Route Summary Page Overview](#)
  - ☐ How to order and when to adjust - [ION Video 9 – How to Make Order Adjustment in Product Summary Page](#)
  - ☐ Delivery patterns - [ION Video 6 – Customer Service Pattern in Store Summary Page](#)
  - ☐ Order windows and product lead times - [ION Video 2 – Product & Store Tabs in Route Summary Page](#)
  - ☐ Promotional calendars for ordering - [ION Video 5 – Promotion Tabs & New Items in Store Summary Page](#)
  - ☐ Additional ION Videos & Decks
    - ☐ [ION Introduction Deck](#)
    - ☐ [ION Coaching Deck – optional OSL tool](#)
    - ☐ [ION Videos – 9 optional ION videos](#)
- ☐ Safe Carry Over (SCO)
  - ☐ [Safe Carry Over \(SCO\)](#)

### Week 3

- ☐ Provide 2<sup>nd</sup> Knowledge Check and Review
  - ☐ [Knowledge Check Week 2 Link](#)
- ☐ Review anything not covered in Week 2
- ☐ Brand education & merchandising (remaining brand videos)
  - ☐ [Merchandising Video Library](#)
- ☐ Review customer service expectations for purchasing accounts (including pull ups)
- ☐ Schedule Follow Up (30, 60, and 90) Day meetings

### Follow Up Days (30, 60, 90-Days)

- ☐ [Follow Up Days Checklist](#)
  - ☐ ION
  - ☐ SBT
  - ☐ Settlement
  - ☐ Handheld/RTM
  - ☐ AM/PM Process
  - ☐ Customer Account
- ☐ Feedback Survey
  - ☐ [IBP Feedback Survey \(30 days\)](#)
  - ☐ Equity review in Qlik (90 days)