

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
 - ☐ [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 2nd 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)