



## SEASONAL TEAM SALES LEAD TRAINING CHECKLIST LIST

EMPLOYEE NAME:			
SHIFT 1	ASSOCIATE SIGN OFF	MANAGER SIGN OFF	DATE COMPLETED
Welcome			
Ensure onboarding is completed, <b>including I9 verification</b>			
Clock In & Clock Out Process			
Introduction to the Team			
Store Tour of All Teams and Backroom			
Sit down and discuss <a href="#">New Hire Welcome Document</a>			
Dress Code and Employee Discount			
Review dress code with Associate using the Retail Handbook			
Review the Employee Discount Policy with Associate using the Retail Handbook			
Associate receives apron, lanyard, and first free t-shirt			
Print an Employee Barcode from NetSuite for the Associate to login to applications			
5 Characteristics of Rally House Party Staff			
Manager review with Associate the <a href="#">5 Characteristics of Rally House Party Staff document</a>			
Ensure Key Holder Agreement completed in HRIS System			
Training Manager ensures Part Time Manager has Alarm Code			
Party Training: 3E's			
Manager review with Associate the 3E's document – <a href="#">Experience, Execution, Everything You Need</a>			
Party Training: 6 Steps of the Party			
Manager Review with Associate the <a href="#">6 Steps of the Party</a>			
Manager and Associate discuss the importance of each step			
Cashier and POS Training			
Associate watch "How to Ring at POS" video <ul style="list-style-type: none"> <li>• <a href="#">Sitoo</a> (videos are in Zipline)</li> </ul>			
Manager assist Associate logging into POS			
Review how to ring a sale with and without the scanner			
Review how to find an item without a tag – Item Lookup and Text Search in Admin			
Review Customer Capture			
Review accepted payment forms: CC/Gift Card/Cash			
Reprint a receipt and print a gift receipt			
Review how to void items from a transaction			
Review how to apply discounts and coupons to a transaction			



Manager explain the Returns Policy Statement			
Associate read the <a href="#">Returns and Exchanges With Receipt Best Practice</a>			
Associate read the <a href="#">Returns Without Receipt Best Practice</a>			
Associate read the <a href="#">Gift Cards Dos and Don't Best Practice</a>			
Manager review with Associate how to complete a return with a receipt			
Manager review with Associate how to complete an exchange without a receipt			
Practice ringing live transactions			



EMPLOYEE NAME:			
SHIFT 2	ASSOCIATE SIGN OFF	MANAGER SIGN OFF	DATE COMPLETED
Process Shipment			
Review how to fold men's and women's product			
Review how to hang men's and women's product			
Review how to hang and fold kids and youth product			
Associate work on shipment processing while working as Party Host			
Fulfilling Customer Orders			
Associate reads the <a href="#">Picking Customer Orders Best Practice</a>			
Associate reads the <a href="#">Packing and Shipping Customer Orders Best Practice</a>			
Associate fulfills customer orders that are in the queue			
Zebra Review			
Review operations and buttons of the <a href="#">Zebra Handheld Device</a>			
Review <a href="#">Yealink Phone</a> and seasonal phone greeting			
Associate in charge of answering phone while working as Party Host			
Daily Set-Up			
Manager review Store Binder with Associate			
Manager ensure associate can log into Zipline			
Manager explain Zipline to associate and expectation on checking at the beginning of each shift			
Part Time Manager reviews the following Zipline training materials: <ul style="list-style-type: none"> <li>• <a href="#">Zipline Library</a> within Zipline Location</li> <li>• <a href="#">Store Quick Start Guide</a></li> <li>• <a href="#">Zipline Log In Issues</a></li> <li>• <a href="#">Zipline FAQs</a></li> </ul>			
Manager explain request off procedure and how Associate will receive schedules			



EMPLOYEE NAME:			
SHIFT 3 – MUST BE A CLOSING SHIFT	ASSOCIATE SIGN OFF	MANAGER SIGN OFF	DATE COMPLETED
Loss Prevention			
Manager review the <a href="#">Loss Prevention Process</a> with Associate			
Discuss intercom phone usage in store			
Daily Checklists			
Review daily checklists within Zipline			
Review the What's Next Audit together and complete one for today			
Review the Visual Merchandising Checklist together and complete one for today			
Review Sunday Super Clean checklist together			
NetSuite Dashboard			
Store Dashboard Review of Daily Reports			
Review Shortcuts on dashboard			
Review <a href="#">Creating a Case Best Practice</a>			
Review <a href="#">Updating a Case Best Practice</a>			
Review <a href="#">Incident Reporting Best Practice</a>			
Training Site			
Review how to use the <a href="#">Training Website</a>			
Review how to search key words for best practice			
Office 365			
Sign In/Password/Inbox Review/Calendar			
Closing Procedures			
Close the registers and complete Deposit Entry in NetSuite			
File Paperwork in EODR file			
Sign off on back-door sign off sheet			
Complete Pre-Close and Closed Checklist in Zipline			



EMPLOYEE NAME:			
SHIFT 4 – MUST BE AN OPENING SHIFT	ASSOCIATE SIGN OFF	MANAGER SIGN OFF	DATE COMPLETED
Store Opening Procedures			
Open & Count Registers - Create Change Order if Needed. Take or Send Deposit to the Bank			
Submit Deposit Receipt in NetSuite			
Preview Sales Goal for the day			
Complete Pre-Open and Opened Checklist in Zipline			
Check E-mail and Stores NetSuite dashboard for tasks			
Complete Visual Merchandising Checklist Audit for the day			
Check Customer Orders and Fulfill Orders			
Review: Inventory Control			
<a href="#">Transfers</a>			
<a href="#">PO Issues</a>			
<a href="#">Damages, Defective and Expired (DDE)</a>			
Processing shipment			
Fulfilling customer orders and packaging for shipment			
Printing tags			