

Training / Implementation Schedule and Suggestions

Per Installation Information	
Customer:	
Customer Contact:	
Installation Address:	
City,State Zip:	
SBS Trainer:	
Training Start Date:	
Training End Date:	

The work you are about to do for the customer is not as much about a change in business processes but for you to understand how to implement SPOT in this new environment and understand what the customer is requiring for this operation for a quality transition to using SPOT. This is why it is so important to understand that it is not just “training” a user how to use SPOT but how to “implement” SPOT in the customer’s business.

SBS will make every effort to accommodate any configuration and implementation suggestion that we have available in SPOT at the time of the installation. This document and proposed outlines are based on years of experience at implementing SPOT into hundreds of businesses. If you find items in this document you do not understand or agree with please contact Mark Jones for clarification. It is better for the customer to hear an honest “no” today than to hear “yes” today and “no, I’m sorry” in the future for something we may or may not be able to do.

Before the installation

In the weeks prior to the installation these items must be addressed by both SBS sales and trainers as a team effort. The customer must be contacted and introduced to the implementation team before going to the customer’s site. If you find any issues in your conversations before you arrive it will allow for time to remedy any issue found prior to your arrival.

General Questions Previous to On-Site Visit	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Discuss the installation and training time line. If it is a conversion make sure you have a plan for hardware placement and locations before you arrive. This makes the movement of existing equipment and the disruption of business much easier when you arrive Date: / / Notes:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Does the customer have an onsite trainer or training department? If so is this person going to be in charge of the installation and training process? Time lines available for the customer to assist and learn? Date: / / Notes:
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Discuss access to data for data conversion and the time line needed to export / import and test the data. What system is it? Explain data conversion options and time lines. Review the need for an extra ½ day

	<p>or more for importing and testing if needed. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Make sure the customer has employees available during the described training time. The store should have extra staff for training and staff for operations in the store. If there are no employees covering store operations then the training will be next to impossible. It is suggested that in a large installation that a Sunday be utilized for training. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Verify that price tables, promised date schedules and clerks are ready to go for the installation. If price tables are not completed before on site begins time will be wasted creating price tables and will take away allocated time from training. Date: / / Notes:</p>
	<p>Verify with customer what special needs they may have for power, running network cable, placing computers on shelves etc. It is very hard to recover from an expected 3 hour installation of hardware when it actually takes you 8. This is 5 hours of lost training time that will come back to haunt SBS and the customer when it comes time to catch your plane at the end of the week.</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>If this is a hosted or self hosted installation verify the internet connectivity is in place. Also verify that the installation has a connection with consistent latency of less than 170 ms from the internal network of the installation to one of the published SPOT ICA interfaces. WSIPing or SPOTConnect should be run for a minimum of 48 hours and the logs verified by network operations for reliable connectivity. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>If we are using customer's equipment make sure they understand that it is their equipment and we have no control over the time it takes to configure new OS, service packs, updates etc on the hardware. Is the hardware in place now or new in boxes? Set the expectation of new hardware out of our control will/could take valuable training time to configure. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Talk not only to the owner of the store but as many managers, CSR's and production folks that you can. Very often you will find what the owner is thinking they do is not what they really do. A conference call with the owner and key personnel will save on site time when it comes to discovering special needs for the installation. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Discuss and verify location and driving directions to store and location of hotel. Use mappoint.com or other tool to create driving directions to</p>

	<p>and from airport and to and from hotel to location. This is a huge time saver. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Supply sample A/R statements they will be using and suggest that they send these out with the next available statement run with a sample and a notice that billing will be changing. Explain the use of our balance forward for the first statement they receive. These samples will make all the difference in the world when it comes to converting customer to a new statement layout and use of a balance forward for previous systems aging. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Inquire about the use of Credit Cards integrated in SPOT. Is the paperwork underway and configuration files available from PPI or their own Credit Card processing provider. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Review the SPOT Implementation Guide and review the PCI compliance of the Company and verify the following Internet Access: <input type="checkbox"/> Firewall in place: <input type="checkbox"/> Antivirus installed/current: <input type="checkbox"/> Passwords enabled in SPOT: <input type="checkbox"/> OS not using Default Login ID: <input type="checkbox"/></p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Inquire about the use of Routes and Hotels. Understand the current configuration and usage. Discuss the possibilities of needing an additional day just for the configuration and training of Routes and Hotels. Date: / / Notes:</p>
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<p>Explain the use of Direct Receives and the need for additional labor to accomplish this task. Estimate 5 hours for two people and a 1000 slot conveyor. Date: / / Notes:</p>

Knowing before you get there should be the mentality of the installation. Why is the customer installing SPOT? What are the hardware challenges ahead? Is the customer ready for the "change"? It is better to spend 30 minutes on the phone today and know of issues before hand than to spend 10 hours on site and years of the customer remembering the surprises because of lack of planning.

On Site Installation

This outline assumes a 1-6 station configuration and you have easy access to power, computer locations and counter tops and shelves have cable access available. Add approximately 45 minutes to each station if power needs to be run or counter tops and shelves must be adapted for cabling.

Day 1

Today's goal is to set the expectation of the installation. Arrive on time and make sure you understand the scope of the conversion by talking to key personnel and observing the operation for 30 minutes. Ask questions as you see things you may not understand. You will also need to get hardware ready for training either later this afternoon or first thing in the morning depending on the requirements of the hardware installation. Most installations should only take the morning to get hardware up and running. If this is customer supplied hardware there is no guarantee as to what needs to be installed for proper operation. Service packs, anti-virus etc may cause hours of delay in setting up the network. If SBS runs into issues related to hardware we will have at a minimum of 2 stations ready for training. Training must start on time according to the schedule so that we may leave at the end of the week with training complete! Hardware issues that arise the first day can be resolved after the initial training is complete. Hardware issues will need to be resolved after hours of training or with the assistance of the stores IT staff.

Training outline

Session #1 - 2 hours Maximum per session

Go over home screen and it's process functionality. At this point there is no process of showing how they work just why they do what they do. This sets the stage for the customer to understand the theory and process of SPOT. If they understand the next 15 minutes you are in the drivers seat. If they do not understand you have an up hill battle. Be gentle but explain that questions outside of the module you are training will not be answered until later. If you start going off in a different direction from the module at hand you will confuse the clerks. Keep focused on the module you are currently training in. Explain in detail the benefits of the feature and not just the features. The class will understand the feature if they can envision the benefits.

Session #1 (Maximum of 2.0 hours)			
Home Page			
Overview Manuals	5	<input type="checkbox"/>	Explain content and use of the Quick Start and Users Guide
		<input type="checkbox"/>	Explain most actions in SPOT are 1-3 key/mouse strokes from the home page. Show the use of Numeric keys and other shortcut keys on the home page.
Production Tab	10		
		<input type="checkbox"/>	Quick, Detail, Rack and Pickup explanations
		<input type="checkbox"/>	Discuss the internal status features of SPOT. Quick, detailed/in process, ready, sold. You can use the process view tab to illustrate
		<input type="checkbox"/>	Alerts – Explain the power of the alerts. Knowing before hand.
		<input type="checkbox"/>	Production forecasting – Use examples of work load and employee load required to meet production commitments.
		<input type="checkbox"/>	Transaction Menu – Brief description of what this is and the ability to use the action buttons associated with it.
		<input type="checkbox"/>	Home button
Other Tabs	5	<input type="checkbox"/>	Reports and System tab overview
Q & A	5	<input type="checkbox"/>	Questions and answer's on home page
Quick Process			
Quick Process	15		
		<input type="checkbox"/>	Show the process of customer lookup and creating an order. Use 2 separate departments and explain the use of a visit and store copy of the quick. Explain the visual invoice, department grid, production calendar.
		<input type="checkbox"/>	Show the process of customer lookup, creating an order with 2 departments
		<input type="checkbox"/>	Create an order changing the promised date
		<input type="checkbox"/>	Create an order and add a coupon and order comment.
		<input type="checkbox"/>	Create an order showing the "Split" button options
		<input type="checkbox"/>	
		<input type="checkbox"/>	Illustrate the use of splitting and other advanced options that they can take advantage of and why they improve the process
Q & A	3	<input type="checkbox"/>	Answer any questions on the quick process.
Clerk Hands On	10	<input type="checkbox"/>	Allow clerks to create a quick from an existing customer and ask each clerk to hold on to the quick's they create for later use in detailing orders training.
		<input type="checkbox"/>	Allow clerks to create a quick by adding a new customer.
		<input type="checkbox"/>	Create an order by searching for a customer that does not exist and show the process of adding a customer with basic Name, Address and preference information.
Q & A		<input type="checkbox"/>	Answer any questions on the quick process
Detail Process			
Detail Process	60		
		<input type="checkbox"/>	Explain the Visual Invoice and keep it simple the first couple of examples and orders

		<input type="checkbox"/>	Explain to the clerks you are about to create an order for 3 pair of pants and 2 shirts adding these items at the same time. Create the order with an existing customer using no modifiers. Show the clerks the invoices created and look at their amazement as to how fast you just created the order. Explain with these two invoices how SPOT uses splitting options.
		<input type="checkbox"/>	Explain the Dept, Category, Item screens and their process function
		<input type="checkbox"/>	Explain the Modifiers
		<input type="checkbox"/>	Explain up charges
		<input type="checkbox"/>	Detail several "new" orders with current customers showing different options for pieces, colors, patterns brands, tags etc. Keep this a simple order so they get the basics and don't worry about the exceptions at this time
		<input type="checkbox"/>	Show the process of scanning a quick. Detail an order after scanning a quick and explain the advantages of scanning as opposed to customer lookup or keyboard order number entry.
		<input type="checkbox"/>	Explain the Item level and invoice level options on the detail screen, promised date, comments, adjustments, coupons etc.
		<input type="checkbox"/>	Explain the "Split" button on the detail screen. Explain usage of the button with examples of bulky sweaters or other every day use of the split button.
		<input type="checkbox"/>	Explain Item View button on VI and modify a couple of items
		<input type="checkbox"/>	Explain Order View button on VI and modify a couple of orders
Q & A for detailing		<input type="checkbox"/>	
		<input type="checkbox"/>	Have clerks use existing customer's and the quick's they created to generate new orders using basic functionality. Keep it simple. Once they understand the basics then move on to the details. Have clerks create invoices from both quick and new orders. Make sure all clerks have the option of creating 5 or 6 orders each. Have them detail the garments another clerk is wearing to give them a sense of using actual items in training.
Q & A for detailing	10	<input type="checkbox"/>	
Customer Profile			
Customer Profile	15		
		<input type="checkbox"/>	Show and explain the use of the customers profile and the options of each tab. Keep it simple and make sure they know they have access from any where they can see the customers tab on the VI,
		<input type="checkbox"/>	Explain customer preferences
		<input type="checkbox"/>	Explain bag tag printing
		<input type="checkbox"/>	Explain reminders
		<input type="checkbox"/>	Explain CRM and generate a contact with a phone call, left message and one of the Word Merge documents.
Q & A for Customer	5	<input type="checkbox"/>	
Open Discussion and Practice	15	<input type="checkbox"/>	Have clerks do more general use of creating quick's, creating customers, changing customer information, detailing orders etc. If possible create a real time environment in teams to simulate the counter drop off and generation of quick to the

			detailing of an order. If you have actual clothing this is a great help. Have clerks generate new customers and orders to use in racking and pickup in later training
Break	10	<input type="checkbox"/>	
Session #2 (Maximum of 2.0 hours)			
Racking			
Racking / Inventory	15		
		<input type="checkbox"/>	Show the correct usage of racking screen including the use of the keyboard and barcode reader input
		<input type="checkbox"/>	Show Manual racking
		<input type="checkbox"/>	Show Auto Racking with defined rack location types
		<input type="checkbox"/>	SPOTScan device if available.
		<input type="checkbox"/>	Explain Exceptions and ready status printing options
		<input type="checkbox"/>	Show a price later item if applicable
Q & A	5	<input type="checkbox"/>	Questions and answers on racking
		<input type="checkbox"/>	Have clerks use previously generated detailed orders and use the racking functionality to create ready orders
Order Pickup			
Order Pickup	20		
		<input type="checkbox"/>	Show an example of drawer Check-in and the reason for using it.
		<input type="checkbox"/>	Demonstrate a simple order pickup with ready orders created in racking demonstration explaining the benefits of ready orders and the use of a pick list.
		<input type="checkbox"/>	Create another pickup and explain the other applicable options on the order pickup screen
		<input type="checkbox"/>	Explain Ready orders
		<input type="checkbox"/>	Explain Pre-pay, Deposit and PNP
		<input type="checkbox"/>	Explain Clear, Clear all and Reset
		<input type="checkbox"/>	Explain the drawer usage and tender type options
		<input type="checkbox"/>	Explain edit order or edit item options
Q & A		<input type="checkbox"/>	Question and answers about Order Pickup Process
	10	<input type="checkbox"/>	Allow Clerks to use the order pickup process and use the previously created detailed orders from training.
Q & A	5	<input type="checkbox"/>	Question and answers about Order Pickup Process
General Usage			
Follow up Q & A		<input type="checkbox"/>	Cover any questions on this sessions training
General Usage	60		
Recent Transactions Screen		<input type="checkbox"/>	Explain the usage of the Recent Transaction menu. Give examples of Reprint invoice, customer view, order view and order history etc. Make sure to explain the benefits of using these buttons for many of the day to day processes.
Search / Customer		<input type="checkbox"/>	Customer Lookup by Name, Phone, ID etc. Explain the differences and the usage of each type of customer lookup with benefits of each type
Search / Order		<input type="checkbox"/>	Illustrate Order lookup by barcode, manual entry and the usage of the invoice number sequence used by SPOT.
Search / Garment		<input type="checkbox"/>	Demonstrate a garment search for all customers and then by

			a single customer.
		<input type="checkbox"/>	Use both "All Words and "Matching Words" to illustrate the power of the search
		<input type="checkbox"/>	Demonstrate Print list and View order buttons
Search / Location		<input type="checkbox"/>	Demonstrate the use and reasons to use Location search or Location search with history
Search / Advanced		<input type="checkbox"/>	Demonstrate the usage of these searches and why they are so powerful
		<input type="checkbox"/>	Sort Columns on the View Screen
		<input type="checkbox"/>	Print Report and demonstrate the use of the reports screen to the printer and to an export to Microsoft Excel file.
Drawer Check out		<input type="checkbox"/>	Demonstrate the usage of the System Tab / Drawer Check out, coin counting and printing of Zreport.
		<input type="checkbox"/>	Go over the Zreport and give explanations of how the "Balance" is arrived.
Time Clock		<input type="checkbox"/>	Use the time clock for a punch in and out
		<input type="checkbox"/>	Details available in Time Clock window for clerk hours
		<input type="checkbox"/>	Use of Categories in Time Clock
Q & A		<input type="checkbox"/>	Questions and Answers for this session of training
Clerk Usage		<input type="checkbox"/>	Allow clerks to use the system and explore the options available in SPOT.

Going Live!

You have a lot of items to prepare for after training. This is when the store is going live. There are many small items that can be simple to complete but will cause major issues if they are not completed by the time you go live. This is a list of these Items.

Things "To Do" before going live	
Completed	Description
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Users and basic security is configured. Get the owner/manager of the store to assist you in this configuration for some quick basic training
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Final import and testing of customer data, verify a/r balance, bill to address, a/r payment precedence, preferences, memos, comments, route information
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Display Pole configuration and testing
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Have a second conversation with the staff that the following day will be stressful but will be manageable. You must instill confidence that things will be stressfull with the changes about to occur but will get better in the next couple of days
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Report printers print from all workstations and they are the default printer for the workstation
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Route setup and configuration and training
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Verify Invoice Templates are complete and contain information as needed.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Credit cards configuration is tested including a test transaction.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Cash drawers open with Payin/Payout test transaction
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Tag Setting for each department and tested
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Price tables are complete and tested
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Promised date tables are completed and tested
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Time clock setup must be complete
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Test / Training data must be removed with the kill all sql statement
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Verify Tax and Environmental Charge Configuration
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Invoice Sponsors need to be set as required by the installation. The system does not default to the correct setting. You should set the invoice sponsor to the local store.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Check SPOTScan Devices for operation and configuration of steps or racking locations.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Check bar code readers
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Final installation, configuration and testing of hardware for all devices and "all" production stations
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Verify you have the proper ribbons in tag printers
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Direct receive of all stores current inventory

Before you leave the evening before the day you go live

Before anyone goes home the night before going live all systems must be tested and verified they are ready to go. There will be no time in the morning to fix these small issues. Testing needs to be done in a production environment not just a single customer or a single order. Imported data needs to be accessed and verified. We find that the small things that do not get tested are those things that cause the most pain when we return from an installation.

Day 2 or 3 of training/going live

In most cases Day 2 or 3 of the installation is either a second group of clerks, time for final importing and testing of data, finishing up price tables, finish up direct receives or the actual day the store goes live with SPOT. Either of the above items requires you to be ready for a stressful day. If it is a training day the stress level is low, if it is a day of going live "look out" and prepare yourself, clerks, managers and owners for a busy day. If you are going live you will find that everything will either come together or fall apart this morning. And this result is dependant on your previous training and preparation. You must be sure the clerks are trained and configuration is completed as per your check list from above.

Assuming this is a day of going live you will need to take good notes as to things that are not complete or not working the way they are planned. You will need to review these notes before you leave to verify you have issues and questions covered.

Before you Leave the Installation

Before you leave the installation and return home you must review the following items and have verification that these items are completed and the customer understands his part of the process

Things "To Do" before going Home	
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Verify Scheduled tasks - Backup, shrink, rebuild are working correctly and have written data to the backup directory. Verify the backup batch file for proper location of files to server and other workstation
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Talk about the ability to print statements and process CCOF batch transactions. Suggest that the customer review the manual and schedule a call with tech support when it is time to run statements for the first time.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Talk to manager/owner on follow up items or items that need to be completed. This needs to be done in the morning, afternoon and an hour or so before you leave on the last day of the installation.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Review notes from training and the first day of live production and finalize any issues and come up with a game plan to change or fix these items when you are not there. Leave a copy of notes with the customer so they can not claim ignorance for outstanding issues you have talked about.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Signature of completion for billing / releasing of funds from leasing company. If this is a lease make a phone call to the office and the leasing company to confirm release of funds.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Review Activity Log usage
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Name and location of best clerks, managers for future assistance in follow up training.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Call to Customer Care Manager for a quick introduction and explanation of the support process. Review the PPR and supply relevant phone numbers to support and other required services.
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Talk about the process of follow up training for A/R security etc and how we need to possibly schedule time with proper resource
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Review with owner the last 3 days.

Signature: _____ Date: _____

Store Name: _____

Trainer: _____

Days following the installation

Follow up phone call from the Customer Care Manager for any follow up questions

Proposed Time Line for Installation

Final installation and implementation of production environment

Day 1

4 hours of hardware configuration and testing

4 hours of training to include, Quick, Detail, Rack and Pickup. All front counter and markin clerks will attend. Each trainer can support 1-8 people in training session. If you plan on more than 8 either have 2 trainers or break the group into two sessions.

Testing of equipment and configuration

Day 2

3 Hours of manager training on running reports and other misc operations. Follow up clerk training

2-3 hours of importing and testing of customer data. Verify imported data model within SPOT with a cross reference to Real Time.

Run a thorough test of equipment and configuration for live operations the next morning.

Remove old equipment from counters and move SPOT peripherals into place.

6-12 hours of Inventory and WIP invoice conversions via "Direct Receives", usually done after hours. You will find 2 person teams are the most efficient for this task. Each team will work with a single workstation. As a rule teams can convert a single 1000 slot conveyor in 4-5 hours in teams of 2. It is suggested you have at least 2 teams working on the inventory conversion.

Day 3

Assuming the direct receives are complete the store will be running SPOT at the time the doors open.

Afternoon training session with managers to review daily operation needs and process.

Day 4

Follow up training and configuration continues on this day.

Afternoon training session with managers to review daily operation needs and process.

Day 5

Follow up training and configuration continues on this day.

Afternoon training session with managers to review daily operation needs and process.