

Day 7

Approx 5-7 Hours

- **Observe/Try** – Pre-Open & Daily Checklists.
 - Review receptionist Pre-Open checklists for each location.
 - New hire and trainer to complete all Pre-Open checklist procedures with detailed discussion of each item on the list.
 - Review receptionist Daily checklists for each location.
 - New hire and trainer to complete all Daily checklist procedures with detailed discussion of each item on the list. Special emphasis should be placed on the following checklist items:
 - *“Begin confirmation calls 2 business days in advance.”* Review the expectation that they be 100% completed without exception and that the receptionist must verify that text/e-mail confirmations were sent).
 - *“Receive all orders & review for accuracy and damage. Notify manager and Joy with any discrepancies immediately. Add inventory to Iris. Price and display products. Discard packing materials without delay.”* Receive an order together. If there are no orders to receive, use an invoice from an order that has already been received and walk through the receiving process.
 - *“Review & complete assigned daily inventory.”* Perform an inventory on a SMALL category (no more than 12 skus).
 - *“Continuously walk through the store – fill shelves, organize, clean, price, and straighten all displays.”* Review merchandising, appearance, and cleanliness standards.
 - *“Check out assistants who leave during your shift. Review their checklist with them and have them redo any incomplete items.”* Review assistant checklist to be sure new hire has an understanding of each item on the list. New hire observes trainer while they check an assistant out at the end of their shift.
 - *“Close and balance register. Immediately put the deposit in the safe. Call Joy with all discrepancies over \$2.00.”* Perform a closeout together and review the process.
 - Print and review checklists for both locations for any differences and discuss as needed (be sure new hire understands and can perform all checklist tasks at both locations).
- **Review** – Trainer & new hire to review and discuss opportunity areas: -

Day 8

Approx 5-7 Hours

- **Do** – Pre-Open & Daily Checklists.
 - New hire to complete all Pre-Open checklist procedures while trainer observes.
 - New hire to complete all Daily checklist procedures while trainer observes.

- **Observe** – Advanced Scheduling
 - Trainer to demonstrate how to set up a recurring appointment.
 - Trainer to demonstrate how and when to use the Waitlist feature in Salon Iris.
 - Trainer to demonstrate how to view upcoming appointments in Salon Iris.

- **Do** – Advanced Scheduling
 - New hire should set up a recurring appointment. New hire should then view upcoming appointments for this client. *Be sure to delete the appointments immediately.* New hire should again view upcoming appointments for this client to be sure they were deleted.
 - New hire should set an appointment using the Waitlist feature. This should be done for a day a stylist is time blocked. New hire should then remove the time block and complete the process to schedule the appointment. *Be sure to delete the appointment and add the time block back in immediately.*

- **Observe** – New Products
 - Trainer to demonstrate how to enter new products in Salon Iris. Emphasis should be placed on using existing categories, makes, suppliers, etc. instead of adding new entries that clutter Iris. Emphasis should also be placed on making sure the description is correct (spelling/caps, etc.) and that all important fields are completed.

- **Do** – New Products
 - New hire demonstrates how to add a new product in Salon Iris. Do NOT actually enter a new item unless it is a new item that must be added anyway.

- **Training** – Returns and Exchanges
 - Trainer to demonstrate how to perform a return (do not tender the ticket).
 - Trainer to review how to handle each paytype (cash, credit, check, gift card/certificate) when doing a return.
 - Trainer to discuss our return/exchange policy:
 - 14 days for most purchases / 30 days for salon clients (this is not written on the receipt)
 - Receipt must be presented or we must be able to verify the sale (no exceptions).
 - Clothing MUST be unworn, unused, unwashed, and MUST have tags attached.
 - Hair product should be unopened/unused. We will make an exception if a very small amount has been used.
 - Clients may receive a refund (based on their payment type) if they qualify for a return.
 - Credit card returns MUST go back to the original card (this is a Visa, MasterCard, Amex rule and there are NO exceptions to this).
 - Check purchases can be returned for cash (under \$50) as long as the check has cleared (14 days after purchase). All other check purchases will receive a mail check (collect their information to process the refund).
 - Cash purchases can be returned for cash as long as they do not reduce your register so that you will be unable to process future cash transactions. If the amount is too large, they may have to wait or they can opt to receive a mail check.
 - Returns must not be performed on the original ticket – always start a new ticket.
 - Never perform a return in an attempt to fix a tab. It just will not work.
 - Retain the original receipt and staple it to a copy of the return receipt (put both in the closeout).

- **Do** – Returns and Exchanges
 - New hire to perform a cash return on a snack or beverage. The register will be over at the end of this shift – communicate that with the person who will perform the closeout.
 - New hire to perform an exchange on a snack or beverage (same dollar amount).

- **Review** – Trainer & new hire to review and discuss opportunity areas: -

Day 9

Approx 3-5 Hours

- **Observe/Try** – Pre-Closing & Closing Checklists.
 - Review receptionist Pre-Closing checklists for each location.
 - New hire and trainer to complete all Pre-Closing checklist procedures with detailed discussion of each item on the list.
 - Review receptionist Closing checklists for each location.
 - New hire and trainer to complete all Closing checklist procedures with detailed discussion of each item on the list.
 - Print and review checklists for both locations for any differences and discuss as needed (be sure new hire understands and can perform all checklist tasks at both locations).

- **Review** – Trainer & new hire to review and discuss opportunity areas: -

Day 10

Approx 3-5 Hours

- **Do** – Pre-Closing & Closing Checklists.
 - New hire to complete all Pre-Closing checklist procedures while trainer observes.
 - New hire to complete all Closing checklist procedures while trainer observes.

- **Review** – Trainer & new hire to review and discuss opportunity areas: -

STOP – Trainer is to identify all opportunities and address as needed. Trainer should only continue when they are satisfied that the new hire is fully proficient in:

1. Use of the daily checklists.
2. Opening and closing the salons.
3. Receiving a product order.
4. Completing an accurate inventory.
5. Performing returns and exchanges.
6. Our return policy.
7. Setting up a recurring appointment, using the waitlist feature, and viewing upcoming appointments.
8. Adding new products to inventory.

New Hire has been fully trained on the above skills. Both the trainer and the new hire agree that they are ready to continue with the training process.

(trainer signature)

(new hire signature)

STOP – Attach ALL completed training paperwork from days 7, 8, 9, & 10 to this manual after the 10th day is completed and contact Joy to review progress.