Franchisee Training Curriculum

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Overview

The training process is broken up into a series of webinars. We record each webinar for later reference as well as for training new staff. This is by no means an exhaustive list of what we train for. During the initial phases, we'll identify key areas for the brand staff as well as for the organization owners and tailer the curriculum as we progress.

During training we will discuss configurable sections, fields and areas of service**minder**. To see a full list of these configurable sections click here...

While these are broken down into specific lessons, each training is often broken up across multiple web meetings.

Once **Brand Admins** have gone through training, they will want to know what's the best flow for teaching service**minder** to franchise owners. To learn more about this process, click here...

How Long Does Training Take?

That is dependent on the customization of your workflow within service**minder**, how specialized your business industry, and how comfortable your team is adopting new software.

New Brands to SM

Our onboarding process with a new brand takes between 4 - 7 months, typically.

Existing Brands within SM

If you are an onboarded brand and you are training new franchisees, we usually suggest giving the franchisees a month to train and test within their organization. This is assuming that they do not have full days or weeks devoted to learning the tool, and are also busy with business trainings as well.

There is only so much information that a new student can absorb at one time. To minimize the stress a person may put on themselves to catch on quickly and be ready to "go live" within service**minder**, we like to suggest more than enough time.

Feel free to use the below curriculum as a foundation to teaching new brand admins or franchisees. If you do not have SOPs or processes documented for best practices for your owners, we highly suggest creating them to standardize how you want your owners to properly track metrics or run business within SM.

Training 1 - Basic Overview of the Tool

Day 1 - General Features

1. Home screen/Calendar page
2. Contacts grid
3. Appointments grid
4. Maps
5. Campaigns
6. Search function
7. Shortcuts
8. Taskboards (if your brand has that feature add-on)
9. Texting (if your brand has that feature add-on)

Day 2 - Typical Workflow for Owner/Office Manager

1. Show how to create a new contact
2. Show how an estimate appointment is booked
3. Start/Finish estimate appointment
4. Create proposal
5. Accept proposal
    a. Show view of client and how they accept
    b. Gets card on file
6. Schedule appointments
    a. Show options: single, monthly, bi-weekly
7. Show how to Invoice
8. How payment failures are handled

Training 2 - Brand Admin Overview

Day 3 - ONLY For Brand Admins

1. The brand, organization and user relationships
2. Brand Revenue Categories for royalties and reporting
3. Creating new organizations

4. Deploy
5. Configuration Options
6. Royalties and Reporting

Training 3 - App Overview

Day 4 - Field Work

1. Download from app store/google play
2. Log in, go to My Schedule
3. Tap en route for first appointment, the rest are automatic
4. Hit start upon arrival, finish upon completion, fill out any required fields
5. Will return user to My Schedule for next appointment.
6. Uncheck the "en route" if going on lunch/break.

Training 4 - Owner Training

Day 5 - Final Set Up

1. CONTROL PANEL
    a. Setting up New Users and/or Service Agents
        i. Permissions and Notifications
        ii. Set up a Team *(if needed)*
    b. Integrations
    c. Add Time Blocks or Holidays to Calendar
    d. QuickBooks Online (*check done correctly)*
    e. Map Tax Rates (*check done correctly)*
    f. Add Tax to Services (*check done correctly)*
    g. Invoice Settings (*check done correctly)*
    h. Service Settings (*check done correctly)*
    i. Proposal Settings *(check done correctly)*

Day 6 - Daily To-Dos

1. SNAPSHOTS/SHORTCUTS
    a. At a Glance
    b. Open Invoices
    c. Open Proposals
    d. Backlog
2. HANDLING PAYMENTS
    a. Edit a Proposal or Clear Acceptance
    b. Credit Memos and Discounts
    c. Moving Payments and Merging Invoices
    d. Refunds and Applying Overpayments

Day 7 - Data Tracking

1. REPORTING
    a. Pulse
    b. End of Month
    c. Invoice reporting
    d. Proposal reporting
    e. Revenue
    f. Using grids for finding stuff
2. CHANNELS/CAMPAIGNS – LEAD TRACKING
    a. Campaigns Grid
    b. Channel performance
    c. How to add channel & campaign
    d. Budgeting