



# TRAINING PROGRAMME FOR NEW EXCHANGES

Order	What we will provide	Expected outcome
1	<ul style="list-style-type: none"> <li>• Assistance with selecting a business name and logo</li> <li>• Job descriptions for each position needed to run the business</li> <li>• Job interview questions</li> <li>• Checklists of what each role must do on a daily/weekly basis</li> <li>• Staff administration guides</li> <li>• Sales and administration reporting forms</li> <li>• Training manuals               <ul style="list-style-type: none"> <li>• Software manual</li> <li>• Barter training manual</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Translate job description</li> <li>• Translate interview questions</li> <li>• Translate checklist of what each role must do on a daily/weekly basis</li> <li>• Translate administration guides and reporting forms</li> <li>• <b>Employ 1 administrator</b></li> <li>• <b>Employ 1 graphic designer</b></li> <li>• Translate software and barter training manual</li> <li>• Set up internet access</li> <li>• Set up desks for graphic designer and administrator</li> <li>• Set up computers and printers for graphic designer and administrator</li> <li>• Domain name registered</li> </ul>
2	<ul style="list-style-type: none"> <li>• Pricing plan / fee plan suggestions</li> <li>• Membership terms and conditions template</li> <li>• Privacy policy template</li> <li>• Personal guarantees template</li> <li>• Email templates / text</li> <li>• Phone banking words</li> <li>• SMS Banking templates / text</li> <li>• Website templates / graphics</li> <li>• Application form templates</li> <li>• Sales brochure templates</li> <li>• Welcome pack templates</li> <li>• Letterhead templates</li> <li>• Business card templates</li> <li>• Plastic card templates</li> <li>• Name badge templates</li> <li>• Call centre requirements discussed</li> </ul>	<ul style="list-style-type: none"> <li>• Membership terms and conditions must be checked with lawyers</li> <li>• Privacy policy must be checked with lawyers</li> <li>• Personal guarantee form must be checked with lawyers</li> <li>• Website graphics translated and ready to be loaded</li> <li>• Email template text is translated</li> <li>• SMS Banking text translated</li> <li>• Phone banking text translated</li> <li>• <b>Interview and employ 2 sales people</b></li> </ul>



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3	<ul style="list-style-type: none"> <li>1 week of launch strategy planning with senior management and sales people               <ul style="list-style-type: none"> <li>Which businesses to approach first</li> <li>How to promote the barter business</li> <li>What order the businesses will be approached in</li> <li>How to get the maximum value / financial return from the first members</li> </ul> </li> <li>Press releases about having signed agreement with XO/OzoneCard to establish barter business</li> </ul>	<ul style="list-style-type: none"> <li>Spreadsheet/list made of every business to target for launch</li> <li>Order of which businesses will be approached first is set</li> <li>Initial prices set for first customers (not normal customers)</li> <li>Standard pricing plan set</li> <li>Commission rates to sales staff set</li> <li>Call centre agreed upon</li> <li>Plastic card designed</li> <li>Letterhead and business cards designed</li> <li>Plastic card printing company found</li> <li>Translated software training manuals printed</li> <li>Translated barter training manuals printed</li> </ul>
4	<ul style="list-style-type: none"> <li>1 week of software administration training and setup               <ul style="list-style-type: none"> <li>Creating and inserting the pricing plans</li> <li>Creating and setting credit limits</li> <li>Creating and inserting sales staff and brokers and commission rates to staff</li> <li>Inserting the terms and conditions</li> <li>Inserting the privacy policy</li> <li>Uploading the email template translations</li> <li>Upload the mobile phone banking message translations</li> <li>How to load new members onto the website</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Exchange staff, prices and billing details ready in the system</li> <li>Website graphics in local language and loaded onto site</li> <li>Email templates loaded onto site in local language</li> <li>Application form designed and translated</li> <li>Sales brochure templates translated and designed</li> <li>Administrator understands how to change basic setup on website</li> <li>Sales and administration staff know how to create / load new customers</li> </ul>
5	<ul style="list-style-type: none"> <li>1 week of sales training               <ul style="list-style-type: none"> <li>General information about barter</li> <li>Barter for different industries</li> <li>How to join someone to a barter exchange</li> <li>How to set credit limits for customers</li> </ul> </li> <li>Telephone banking number assigned</li> <li>Mobile phone banking number assigned</li> </ul>	<ul style="list-style-type: none"> <li>Some application forms printed</li> <li>Some sales brochures printed</li> <li>Welcome pack designed and translated</li> <li>Staff uniforms ready</li> <li>Staff business cards printed</li> <li>Letterhead printed</li> </ul>



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6	<ul style="list-style-type: none"> <li>• 1 week of sales visits with sales staff to new customers</li> <li>• 1 week of software administration training</li> <li>• Press release to media about the launch of the website and service</li> </ul>	<ul style="list-style-type: none"> <li>• 10 members signed up</li> <li>• Some shopping centres/business clubs agree to allow application forms to stay on their sites</li> <li>• Administrator knows how to process debits and credits</li> <li>• Administrator knows how to invoice customers and print statements</li> <li>• Administrator knows how to collect fees</li> <li>• Administrator knows how to reverse transactions and fees</li> </ul>
7	<ul style="list-style-type: none"> <li>• Ongoing sales support</li> </ul>	<ul style="list-style-type: none"> <li>• 10 more members signed up</li> <li>• Club or business association agrees to promote the barter concept to their members (in return for commission)</li> <li>• First 10 members beginning trading</li> <li>• First 10 members sent cards and welcome packs</li> <li>• Mass application forms printed for distribution by other organizations to their members</li> </ul>
8	<ul style="list-style-type: none"> <li>• Ongoing sales support</li> </ul>	<ul style="list-style-type: none"> <li>• Next 10 members begin trading</li> <li>• Next 10 members sent welcome packs</li> <li>• Organization distributes member application forms</li> <li>• Application forms sent directly to businesses with letters explaining the barter idea</li> </ul>
9	<ul style="list-style-type: none"> <li>• Continued support</li> </ul>	<ul style="list-style-type: none"> <li>• Next 10 members sent welcome packs</li> <li>• First networking meeting held with existing members</li> <li>• Members are still signing up and trading</li> </ul>