Admin Training Checklist

1 - Onboarding
- ☐ New Hire Checklist - DOC
- ☐ Individual Email Access Set Up

2 - Orientation
- ☐ Sapphire Studio History and Mission
- ☐ Leadership Program - VIDEO
- ☐ Current Team and Roles - Org Chart / Responsibilities and Reporting - DOC
- ☐ Regular Meetings, Annual Schedule and Regular Events
- ☐ Business Overview - 12 VIDEOS

3 - Program Overviews
- ☐ Dance Program Overviews - DOC
- ☐ Take a Dance Intro
- ☐ Current program tuition rates (In Administrative Department folder)
- ☐ Subs
- ☐ Private Lessons

4 - Administrative Access
- ☐ Student Success Advisor Role-DOC
- ☐ Admin Info and Passwords
- ☐ Vonage Phone System and Voicemail (if applicable)
- ☐ Google: Email, Drive> Operations Folder
- ☐ Help Scout

5 - Prospects
- ☐ Prospect Pipeline - DOC
- ☐ Protocols for Student and Prospect Notes - DOC
- ☐ The Info Call - DOC / ROLEPLAY
- ☐ Price Avoidance - DOC / ROLEPLAY
- ☐ New Student Info Forms and Intro Folders
- ☐ The Enrollment Conference - DOC / ROLEPLAY
- ☐ Objection Handling - DOC / VIDEO / ROLEPLAY
- ☐ Basic Marketing

6 - Students
- ☐ The Student Pipeline
- ☐ DNS System
- ☐ Withdrawals
- ☐ Inactive Students and Reactivating a Student

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7 - Payments
- ☐ Billing Accounts: Create a New, Use an Existing Account
- ☐ Payment Schedules: Creating, Updating, Suspending, Pausing
- ☐ Quick Pay
- ☐ Receipts and Invoices
- ☐ Register and Petty Cash Box
- ☐ Late Payments Pipeline - Compete Services
- ☐ Payment Disputes/Issues

8 - Classes and Programs
- ☐ Current Class Schedules
- ☐ View Classes / Add a Class
- ☐ Adding/Removing Students and Prospects from a Class
- ☐ Waiting Lists
- ☐ Printing Attendance

9 - Front Desk
- ☐ Dance Uniforms and Shoes
- ☐ Cleaning and Facilities
- ☐ Current merchandise rates and other fees