

ULTIMATE LEADERSHIP

MARTIAL ARTS

ULTIMATE

HQ

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Operations
Handbook

STAFF POSITION: XP STAFF

THE WIN: Above all else, we make a positive connection with students and parents.

Responsibilities:

- 1. Quick Prep**
- 2. Tie It Up Jobs**
- 3. Parent Connection**
- 4. Good Job Post Cards**
- 5. In Uniform 30 Minutes Before Classes**
- 6. Teach/Assist With Awesome Classes**

1. Quick Prep:

- Straighten chairs and tables Light candle
- Restock restrooms
- Wipe down tables
- Spot clean windows and glass
- Lobby trash is empty
- Wipe down restrooms with Clorox wipes
- Turn on TVs in Lobby (With new movie on kid's TV)

2. Tie It Up jobs:

- Replace all equipment used in classes
- Throw away any trash on tkd floor (ie water bottles)
- Place completed postcards on the front counter
- Take out all trash
- Blow out candle
- Straighten the instructor station
- Enter any unentered attendance

3. Parent Connection:

ULMAHQ is all about COMMUNITY. In order to accomplish this each week it is imperative that we connect with our parents. This connection can be a praise of their student or a common interest. Asking a parent if they are

watching the game today or telling them their child rocked his form creates a personal interaction that takes ULMA from a business to a community.

4. Good Job Post Cards:

- At the end of each day write out 5 good job postcards. The card should be sent out to the kids in class who worked hard or who need encouragement. It is the policy of ULMA to send each child a good job postcard each cycle. The cards, the labels, and the stamps are located on the instructor station.
- Once these have been completed leave the cards on the front counter to be sent out with the next days mail.

5. In Uniform 30 Minutes Before Classes

- If your hours have you at the academy 30 minutes before classes start or earlier, you should be in uniform at the 30 minute mark.
- You should be on the training floor 10 minutes prior to class starting as well as in between classes to make a connection with the students.

6. Teach/Assist With Awesome Classes

- Make it happen!

STAFF POSITION: TACTICAL DIRECTOR

THE WIN: To be the cleanest place in town and be ready to WOW our clients.

Responsibilities:

- 1. Prep For Classes**
- 2. Weekly Clean**
- 3. Monthly Clean**
- 4. Parent Connection**
- 5. Good Job Post Cards**
- 6. In Uniform 30 Minutes Before Classes**
- 7. Teach/Assist With Awesome Classes**

1. Prep For Classes

- 1.5 hours before class begin, start completing the following items:
 1. Arrange chair rows and chairs with tables
 2. Wipe down all chairs tables
 3. Wipe all bathroom fixtures down with clorox wipes
 4. Restock both restrooms with Tp, paper towels, and soap
 5. Light candle
 6. Straighten equipment area on back and front floors
 7. Restock uniforms on Pro shop
 8. Swifter wood floors
 9. Make sure all office & lobby trash is empty
 10. Restock literature boxes at front counter- Schedules, Leadership Worksheets, Uniform Sheets, any upcoming event literature, & School Presentation sheets. All of these can be found on Drop Box in the UMLMAHQ DOX Folder.
 11. Windex the door to TKD school
 12. Spot clean windows, mirrors, and lobby glass.
 13. Turn on TVs in Lobby (With new movie on kid's TV)

2. Weekly Clean:

Each week we hit certain cleaning steps to insure that ULMAHQ is always the cleanest place in town.

1. Vacuum the TaeKwonDo Floor
2. Light mop the TaeKwonDo Floor
3. Light mop the lobby
4. Vacuum the entry way
5. Vacuum the changing rooms
6. Change out the urinal mint
7. Restock any items left out behind front counter
8. Wipe down the front counter (remove all items to do this)
9. Clear off the Shelving unit top. This should be clear of items at all times but things tend to get placed here during busy shifts
10. Clear out shoe boxes
11. Dust Equipment areas floor 1 and floor 2
12. Windex all viewing area glass
13. Place all items in the back room where they go
14. Replace any light bulbs that are out
15. Wipe down the space behind the pro-shop grid for dust bunnies

3. Monthly Clean:

1. Dust all fans
2. Wipe out shoe boxes
3. Bag up lost and found for Goodwill
4. Wipe down all baseboards in lobby and training area.
5. Vacuum off AC Returns.
6. Go on a dust bunny hunt.
7. Back room should be immaculately clean.

4. Parent Connection:

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postcard each cycle. The cards, the labels, and the stamps are located on the instructor station.

- Once these have been completed leave the cards on the front counter to be sent out with the next days mail.

6. In Uniform 30 Minutes Before Classes

- If your hours have you at the academy 30 minutes before classes start or earlier, you should be in uniform at the 30 minute mark.
- You should be on the training floor 10 minutes prior to class starting as well as in between classes to make a connection with the students.

7. Teach/Assist With Awesome Classes

- Make it happen!

Tactical Director How-Tos:

Cleaning process:

It is the desire of ULMAHQ to work with as much proficiently as possible without compromising the excellence of the job.

1. When vacuuming the TaeKwonDo floor use the Dyson vacuum. Work in an up three mats back three mats from left to right method. Once those rows are completed move back to the next three rows moving right to left and so on until the floor has been fully vacuumed. This process should take 45 mins or less!
2. Dry mopping the TKD floor by filling the mop bucket with 1 cup of Odo ban and the rest water. Start on the floor where classes will begin first. wet mop and wring out the mop until it is damp only. Quickly mop the floor using the 3 mat method used to vacuum. This should take less 45 mins. Because the mop is ONLY DAMP it should take very little time to dry.
3. Cleaning items at the TKD school. ULMAHQ is not partial to any one product other than Odo Ban. We purchase what is available or on sale at Sams. This can and does change. Do not be handicapped by not having the normal cleaning solution on hand. Use what is available and improvise if necessary.

Cleaning up an accident on the training floor:

The one time we are able to use our true ninja skills on the TKD floor. This operation should be as covert as possible. Only one employee is necessary for this job. It is not a glorious moment for the student or for the person cleaning, but as we are here to build other up anything we can do to minimize the attention brought to the situation the better.

1. Inform the staff member behind the counter so they can help the student with a change of pants and parent notification.
2. Grab the blue rags (paper towels if necessary) and a trash bag to soak up the area. Place the soiled items in the trash bag. Then spray down the area with Odo Ban. This is a cleaning agent and a disinfectant. Mop the area if needed, but remember to do so drawing as little attention to yourself as possible.

STAFF POSITION: Lead Program Coordinator

THE WIN(s):

- 1. Through personal investment, know who we are and are not seeing in classes.**
- 2. Delivering the Ultimate Experience for all clients.**

Responsibilities:

- 1. A-Game List**
- 2. Inventory Track**
- 3. Inventory Restock**
- 4. Inventory Order**
- 5. Uniform Pick Up/Drop Off**
- 6. Sams Run**
- 7. Attendance Tracking**
- 8. Office Depot Run**
- 9. Testing Meeting**
- 10. Event Prep**
- 11. Parent Connection**
- 12. Good Job Post Cards**
- 13. In Uniform 30 Minutes Before Classes**
- 14. Teach/Assist With Awesome Classes**

1. A-Game List:

- 1. Plan Classes:**
 - Get an official class planner: LINK
 - Refer to the current Curriculum Packet for week and daily themes
 - Get class/drill ideas:
 - ProMAC: <http://www2.professionalmartialartscollege.com/login.aspx>
 - Log In:
 - Password:
 - Write out drills in each section
 - Write in Class Goals at top right
 - Circle the PUMP Drill: The drill that makes the class worth coming to.

- Post your planner at the front of the training floor. Greet parents with a hello and students with high fives. The goal is to create community and energize the students
2. Get in uniform 30 minutes prior to 1st class starting
 3. Do a quick check of equipment to make sure you have what is needed for classes and that all equipment is put away properly
 4. Turn on music on the Training Floor PC and turn on amp
 5. Greet clients as they arrive

2. Inventory Track:

- Take the ULMA Inventory form to the back room and take an inventory of Uniforms and gear. (Remember to include the uniforms on the pro shop rack)
- Take the on hand number and compare it to the ULMA minimum number and make a list of what is needed
- Refer to the ULMA Orders section on Cozi for ordered items. Adjust the order as needed to receive the minimum count on equipment and the ordered equipment.
- Denote on Cozi when the item has been ordered

3.Inventory Order:

Take your finalized order and call Brenda from Macho 1-800-327-6812. Always order COD unless direct otherwise by owners.

4. Inventory Restock:

- Once your order comes in check Cozi ULMA order list lable ordered items and place behind the front counter . Denote that the items are here on Cozi. Restock the remaining items in the back room.

5. Uniform Pick Up/Drop Off

- Staff will place uniforms in the out bin behind the front counter and place the name of the student into Coz on the to do list entitles “ Uniform Drop off”
- Take the uniforms ready to go out to The Springboro Sew shop and pick up the uniforms that are completed from Image Market.

- Denote the list in Cozi when the uniform is taken out and when the uniform has returned. (Follow directions in Cozi)
- Place returned uniforms in the in bin located behind the front counter

6.Sams Run

- Sams is done on the day denoted on the Cozi calendar. Take the Shopping list also located in Cozi entitled “ Sams” and get the items that have been check as needed.

7. Attendance Tracking

We Miss You Tasks:

- Print WE MISS YOU LIST
 1. Log into ULMAHQ.com and go to the CONTACTS tab
 2. Click on the LAST ATTENDED list on the left panel
 3. Click the student check box of the 1st student listed
 4. Scroll down until you have all of the students who we have not seen in 2 weeks.
 5. While holding the SHIFT key, Click on the student check box of the last student on the list (the effect should be that all of the check boxes are selected)
 6. At the top, click the PRINT option (this will open up a window)
 7. Scroll through documents until you find the document named: WE MISS YOU LIST
 8. Select that list and it will open in a separate tab
 9. Print the list
- Print Labels:
 1. Go back to the tab where all of the students are still selected and again click on the PRINT option.
 2. Scroll through documents until you find the document named: ADDRESS LABELS ULMAHQ 001
 3. Select that file and it will open in a separate tab
 4. Print on label paper (note: label paper goes face up in the printer)
- Assess and make notes on WE MISS YOU LIST:
 1. Next to each student’s name, write the number for how many weeks it has been since the student trained

2. Look through the last 2 WE MISS YOU LIST reports that were done by you or other staff and make notes on students still on the list.
3. Scan through the quick notes and mark those students (it may be nice/necessary to drop those students an e-mail to check in)
4. Assess who needs a call, who needs a postcard and who needs an e-mail.
5. Make calls 1st
6. Label Postcards and take to UPS Store
7. Select students and send we miss you e-mail.
8. MAKE NOTES ON WHAT YOU DID ON EACH STUDENT TO REFER TO ON THE NEXT WEEK!

8. Office Depot Run

- Office Depot is done on the day denoted on the Cozi calendar. Take the Shopping list also located in Cozi entitled “ Office Depot” and get the items that have been check as needed.

9. Testing Meeting

- Be present at the meeting with the knowledge of who we are not seeing in classes and who has low attendance for the cycle. Meeting will be ran by Mrs. Mershad

10. Event Prep

- Based on the upcoming events of the cycle go to the event in the to do list. Pull up an event and proceed to do one or a few items of on the list to prepare for the event. Some items may be assigned to you so look for that on the event list. If you need direction as to where to start see Mrs. Mershad.

11. Parent Connection:

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12. Good Job Post Cards:

- At the end of each day write out 5 good job postcards. The card should be sent out to the kids in class who worked hard or who need encouragement. It is the policy of ULMA to send each child a good job postcard each cycle. The cards, the labels, and the stamps are located on the instructor station.
- Once these have been completed leave the cards on the front counter to be sent out with the next days mail.

13. In Uniform 30 Minutes Before Classes

- If your hours have you at the academy 30 minutes before classes start or earlier, you should be in uniform at the 30 minute mark.
- You should be on the training floor 10 minutes prior to class starting as well as in between classes to make a connection with the students.

14. Teach/Assist With Awesome Classes

- Make it happen!

STAFF POSITION: Internal Operations Manager

THE WIN(s):

- 1. ULMA Memberships are up to date**
- 2. Keep Mrs. Marshad on track by minimizing distractions and busy work .**

Responsibilities:

- 1. Send Over Payroll**
- 2. Write Out Payroll**
- 3. Update All Memberships**
- 4. Update All Freeze/Cancel Forms**
- 5. Enter New Contracts**
- 6. Track Delinquent Members**
- 7. Manage Cozi**
- 8. Update Bank Ledger**
- 9. Parent Connections**

1. Send Over Payroll

- Each week ULMAHQ pays it's employees on Thursday for the prior week Monday through Saturday.
- Take the calendar from the back room employee board and add up hours for those employees on salary. Using the web site MYTIMESTATION.com Log in:
- compare your hours with those logged and make adjustments where needed. Take added hours and salary hours and send over payroll to Phylis Clark at [E-MAIL](#)

2. Write Out Payroll

- A return email normally arrives within 24 hours. Select the email print the attachment and print the pay stub.
- Write out paycheck and place them in the staff envelopes by thursday each week.(Be careful to make sure amounts match the final amount on the pay stubs)

3. Update All Memberships

- Weekly scan of all quick notes to add and delete when needed.
- Place the Academic and Leadership stars earned in the boxes and delete when testing is over.
- Up date CC info for expired cc dates

4. Update All Freeze/Cancel Forms

This process must be completed in person. The forms can be found in the folders tabbed cancelation in the center section of the book shelf behind the front counter. WE CAN ONLY FREEZE ACCOUNTS FOR 2 MONTHS

1. After the parent fills out the cancelation form sign the form as the employee witness.
2. Write on the form what the date of the last two payments are. This can be found by looking up the contact and selecting the current membership. The payment date will pull up at this time.
3. Make a copy of the form. Keep the original copy and give the copy to the client.
4. If it is a freeze form go into the contact. You may have to look for which student if it is a family. It is normally the contact in the family who has trained the longest or if the family all started together it is the oldest member of the family. Once you find the contact that has the paying membership connected to it. select the active membership
5. The payments will come up. Select the payments that need to be frozen and forfeit those amounts. The payments will then pick up again on the payments not forfeited.
6. Place the form in the students hard copy file. Files are located in the front counter shelving unit middle bottom shelf.

If you are canceling a membership:

1. Select the X on the active membership and follow the prompts.
2. Then enter a new membership by pressing the Add Membership button.
3. Select the 60 cancelation membership.
4. Proceed with the membership process as described in the add new member section.
5. Select the check box entitled “ 60day cancelation”

6. Place hard copy for cancelation/ form in their file. Files are located in the front counter shelving unit in middle on the bottom shelf.

5. Enter New Contracts

- Once a student signs up for classes on a temp membership or an ongoing membership the contract needs to be entered into Cozi.
- Go to the Student page of Champions Way and add a new student by pressing the + sign. Proceed to enter all the information asked.
REMEMBER TO PLACE A SIZE IN THE BELT BOX!
- Then add membership by selecting the add membership box.
- Select the membership that applies to the student . If necessary adjust the price on the membership you select.
- Select the buy now button
- If there is a down payment with our current special add it in the downpayment box. If not leave this box empty.
- Then fill in the Pay later option with the date and method of payment.
- Process payment and print receipt even if the payment is a future one .
- Make a folder for the student in the name of the responsible adults last name. Place membership, release form and receipt in the folder.
- Then open drop box and update the file titled “active contracts” by adding the contract to the appropriate date of payment.

6. Track Delinquent Members

- Use the Past Due report in Perfect Mind to track those members whose CC charge did not go through.
- Call those clients and update the files.
- Forfeit the past due payment and run a new payment for the forfeited one
- Send an email to Mrs. Mershad denoting how each past due client was handled

7. Manage Cozi

- Go to the journal section of Cozi and erase old entries.
- Tie up loose ends that may be waiting for a response

8. Update Bank Ledger

- Using the carbon copy from the check book write out the checks written in the blue ledger
- Once a carbon copy check ledger has been copied into the blue ledger place the carbon copy in the bank ledger file located in the office.

9. Parent Connections

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STAFF POSITION: Customer Service Advocate

THE WIN: With a smile, be able to answer client questions about academy events and program information.

Responsibilities:

- 1. Work POS Software**
- 2. Make Lobby Announcements**
- 3. Get Photo Of Students For PM**
- 4. Schedule New Students For A Lesson**
- 5. Schedule Private Lessons**
- 6. Answer Phone**
- 7. Register Students For Events**
- 8. Enroll New Students**
- 9. Stat Recorded and Communicated**
- 10. Cancellation/Freeze Forms Filled Out**
- 11. Schedule someone for a Birthday Party**

1. Work POS Software

- Open PM3 using the user name and password
- Select the tab titled PRODUCTS
- Select the product and or products needed. The product can be found quickly by looking up the item in the find field.
- Hover over the Actions word to the right of the item and select add to cart.
- Once all items have been added to the cart select the cart icon at the top left side of your screen.
- Once on the cart screen you are ready to check out your client. Review the cart.
- NOTE: THE CART WILL SOMETIMES HAVE ITEM THAT YOU DID NOT PLACE IN IT SO ALWAYS REVIEW THE CAR
- Adjustments can be made at this time to pricing, quantity, and discounts,
- Place the name of the customer in the customer fields.
- NOTE BE SURE THAT YOU ARE CHOOSING A CURRENT CUSTOMER
- Enter the payment type into the pay now field.
- If paying by CC select the correct card and have the client confirm the last 4 digits of the card. This insures no issues with the wrong card being charged.
- If the client requests the pay later option select the date they want to be charged and the CC the payment will be charged to.
- Proceed to process charge.

- Once the CC as been processed (weather it be pay now or pay later) it will direct you to the receipt page. Giving you the option to email or print the receipt. Always choose print.
- Once the print window appears you can either print or x off the print screen and email the receipt.

2. Make Lobby Announcements

- Go to the to do list entitled upcoming events and make the announcements that are listed. Make these announcements at peak lobby times.

3. Get Photo Of Students For PM

- Taking Floor iPad and log into www.ULMAHQ.com
- Check all white belts under the PROMOTIONS tab.
- Verify that all White Belts have a photo.
- If they do not, pull them aside and let them know that we need their picture to make them official students (to keep it light and make them comfortable with you taking their photo).
- Click on the name of the student
- Click the Pencil Icon to edit student information
- Click CHOOSE FILE under the empty photo window
- Click TAKE PHOTO.
- With iPad turned landscape, take photo of student from shoulders up
- Save.

4. Schedule New Students For A Lesson

- When someone calls for info, pull out the ULMAHQ Prospective Student Form and follow script.
- Once they make an appointment is made the appointment should be placed into the Cozi calendar. The person trying class and a number for should be entered. If the person trying class is a child also input the parents name. It should appear in Cozi on the date that they are coming to classes in the following manner:
- 5:30 Emily Snow (7) Donna Johnson mom 937-555-7354
- Make additional notes on the ULMAHQ Prospective Student Form and put it into the Binder
- Note the call on the stat tracker behind the front counter. (see STAT TRACKER for more information)
- Appointment confirmation is done by logging on to Cozi and looking to the next day of appointments. Each apt should have a number and a contact person in the examples case the point person is Donna Johnson. The confirmation call would go as follows:
 ULMA STAFF: This is Jen Mershad from Ultimate Leadership Martial Arts. I was calling to confirm your apt for Emily in Class tomorrow at 5:30.
 DONNA JOHNSON: Yes we will be there

ULMA STAFF : Great! We look forward to seeing you guys tomorrow. Remember to arrive a few minutes early in order to get acclimated with the academy before class begins

DONNA JOHNSON: Ok thanks.

After the confirmation is complete please denote the call on Cozi

LM - denotes a left message

LC - denote live confirmation

NA - denotes no answer and no voicemail

5. Schedule Private Lessons

Private lessons can be placed on the calendar for any time in the hour before classes. A few lessons can be placed in while classes are in session (see private lesson schedule for available times these often correspond with floor two being open and having enough instructors to do the lesson)

- Open a Cozi and proceed to the calendar.
- Select the date then enter the time, name of student, instructor name, and a phone number (Mr. Mershad does not do private lessons unless he gives verbal approval)
- Then set the alert so we are notified the day of the lesson

6. Answer Phone

- Answer the phone with “ Ultimate Leadership Martial Arts can I help You”
- Based on the reply of the person calling refer to the correct script.

7. Register Students For Events

Each event has a different method of registration. With the exception of TESTING and TOURNAMENTS, all events payments are taken at the time the event takes place. Taking payment before an event begins creates confusion. Down payments are often taken to reserve a spot for an event but full payment is held until the day of the event.

- Kids Night Out, Clinics, Camps, Instructor seminars are all registered by placing the students name on the correct Cozi List in the “TO DO “ Section. This is the ONLY list system we use.
- Testings are registered Via the Perfect Mind system by going to the calendar and selecting the testing date. Select the student attending and register them as BOOKED. If you are registering one student you can pay for the student from the calendar by clicking the PAY NOW button. Proceed to check out from there and add a cycle shirt if needed as normal. If a family is registering for testing ring them up as a sale. After they have paid go in to the calendar and register each member of the family as BOOKED. Then highlight the student on the paper roster only after the student has benn added to the event in PM3. DENOTE how the student pays on the roster by CC or a check mark with the amount paid.
- Tournament registration is done by hand. The parent fills out a competition form (remember to have the parent sign the back) Ring the student up normally in the PM POS. Take the PAID stamp and stamp the Registration form. Highlight the name on

the registration card once their name has been placed on the roster. Place K on the reg card once the decal has been completed. Take the financial paper that goes with the tournament and place the competitor's name on the sheet. No other information needs to be filled out on that form. Then take the new competitors name and make a kicking guy for the wall. Print, cut out, and hang the decal on the wall.

8. Enroll New Students

ALL STUDENTS TRYING CLASS FOR THE FIRST TIME NEED A RELEASE FORM FILLED OUT BY A PARENT

- See the script for new student registration
- Be up to date on all current specials
- Sound confident even if you don't feel confident
- Place the New Membership in the Binder behind the front counter Labeled "NEW MEMBERSHIPS"

9. Stats Recorded and Communicated

- Locate the monthly stat logs behind front counter
- Make a hash mark in each box that applies as the day progresses
- At the end of the night write the number of the totals in each box
- Take a photo with smart phone and text to owners

10. Cancellation/Freeze Forms Filled Out

- This process must be completed in person. The forms can be found in the folders tabbed cancellation in the center section of the book shelf behind the front counter. WE CAN ONLY FREEZE ACCOUNTS FOR 2 MONTHS
- The parent fills out the cancellation form and signs the form as the employee witnesses.
- Write on the form what the date of the last two payments are. This can be found by looking up the contact and selecting the current membership. The payment date will pull up at this time.
- Make a copy of the form. Keep the original copy and give the copy to the client.
- Place the original form in the binder behind the counter in the section labeled "memberships"

11. Schedule someone for a Birthday Party

ULMAHQ offers birthday parties on Saturdays after classes. Our parties are \$165.00 and they are 2 hours long. There is no limit on the amount of birthday party attendees. ULMAHQ provides 1.5 hours of entertainment with 30 minute for the family to celebrate with cake and presents. We have two time slots for birthday parties. Available times are 1-3 and 4-6. If other times are requested approval will be needed from our party staff and a Mershad before a party can be booked. Our party staff needs to be informed when a party has been booked. To book a party:

- Open Cozi and select the date from the calendar section.

- If the date is free from other parties and other ULMA events add the party to the calendar.
 - NOTE : IF POSSIBLE FILL THE FIRST TIME SLOT FIRST.
- Take down the child's name, age the birthday child is celebrating, parents name if not a member and a contact number
 - NOTE: IF THE CHILD IS A STUDENT A NUMBER AND PARENT NAME IS NOT NEEDED. OTHERWISE IT IS REQUIRED
- If the child is a student no down payment is required. If they are not students a \$25.00 deposit is required to hold the time slot

HOW TO SECTION:

Stat recording and communication:

1. Locate the monthly stat logs behind front counter
2. Make a hash mark in each box that applies as the day progresses
3. At the end of the night write the number of the totals in each box
4. Take a photo with smart phone and text to owners

Taking Photo of new students:

1. Take the Training Floor iPad and log into www.ULMAHQ.com
2. Check all white belts under the PROMOTIONS tab.
3. Verify that all White Belts have a photo.
4. If they do not, pull them aside and let them know that we need their picture to make them official students (to keep it light and make them comfortable with you taking their photo).
5. Click on the name of the student
6. Click the Pencil Icon to edit student information
7. Click CHOOSE FILE under the empty photo window
8. Click TAKE PHOTO.
9. With iPad turned landscape, take photo of student from shoulders up
10. Save.

Check Messages:

1. Messages should be checked at the beginning of the day and upon returning from lunch or running errands. If the academy has messages waiting when up pick up the phone the dial tone will beep before going to a normal dial tone.
2. Dial *79 when picking up the phone the system will then prompt you to enter the password.
3. Enter password followed by the # sign. Password :
4. It will then tell you how many messages you have and prompt you to press 1 to listen to your waiting messages
5. Enter each message that needs to be returned into Cozi on the journal page. Only one journal entry is necessary per time you check message

so just list all messages in one journal entry. DATE THE JOURNAL ENTRY AS MESSAGES

6. If the messages have been properly recorded feel free to erase them. *7
7. When all messages have been heard simply hang up
8. Denote on Cozi who is in charge of the returned call if it is not able to be handled by you. Denote this with the initials of the person who needs to give it their attention.

Return Messages:

1. Go into Cozi Journal and pull up the messages dated from today.
2. Assess what messages are waiting and find the answers to the questions
3. Promptly return all messages that are easily answered. i.e what time is class, sign my child up for an event.
4. Record all returned calls in Cozi next to the original message.
5. If the call requires the attention of a different department text that Department head with a message simply telling them to check the Cozi Journal list of messages from that day.
6. It is the policy of ULMAHQ to attempt to return all calls by the end of each business day or the beginning of the next if the return call time would be past 9pm.

Check and return emails:

Task to be updated as it is implemented

Write Good Job Post Cards:

1. At the end of each day write out 5 good job postcards. The card should be sent out to the kids in class who worked hard or who need encouragement. It is the policy of ULMA to send each child a good job postcard each cycle. The cards, the labels, and the stamps are located on the instructor station.
2. Once these have been completed leave the cards on the front counter to be sent out with the next days mail.

Mail:

1. All mail that needs to be taken out should be placed in the mail out bin behind the front counter. At the beginning of each day the mail out bin should be emptied and walked down to the UPS store.

Making and Confirming Appointments:

1. When someone comes in or calls for information and an appointment is made the appointment should be placed into the Cozi calendar. The person trying class and a number for should be entered. If the person trying class is a child also input the parents name. It should appear in Cozi on the date that they are coming to classes in the following manner:

- 5:30 Emily Snow (7) Donna Johnson mom 937-555-7354

2. Note the call on the stat tracker behind the front counter. (see STAT TRACKER for more information)

3. Appointment confirmation is done by logging on to Cozi and looking to the next day of appointments. Each apt should have a number and a contact person in the examples case the point person is Donna Johnson. The confirmation call would go as follows:

-ULMA STAFF: This is Jen Mershad from Ultimate Leadership Martial Arts. I was calling to confirm your apt for Emily in Class tomorrow at 5:30.

-DONNA JOHNSON: Yes we will be there

-ULMA STAFF : Great! We look forward to seeing you guys tomorrow.

Remember to arrive a few minutes early in order to get acclimated with the academy before class begins

-DONNA JOHNSON: Ok thanks.

After the confirmation is complete please denote the call on Cozi

LM - denotes a left message

LC - denote live confirmation

Social Media Updates:

- Task to be updated as it is implemented

New student Process:

1. Once a student signs up for classes on a temp membership or an ongoing membership the contract needs to be entered into Cozi.
2. Go to the Student page of Champions Way and add a new student by pressing the + sign. Proceed to enter all the information asked.
REMEMBER TO PLACE A SIZE IN THE BELT BOX!
3. Then add membership by selecting the add membership box.
4. Select the membership that applies to the student . If necessary adjust the price on the membership you select.

5. Select the buy now button
6. If there is a down payment with our current special add it in the downpayment box. If not leave this box empty.
7. Then fill in the Pay later option with the date and method of payment.
8. Process payment and print receipt even if the payment is a future one .
9. Make a folder for the student in the name of the responsible adults last name. Place membership, release form and receipt in the folder.
10. Then open drop box and update the file titled "active contracts" by adding the contract to the appropriate date of payment.

Freeze/ Cancellation Process:

This process must be completed in person. The forms can be found in the folders tabbed cancellation in the center section of the book shelf behind the front counter. **WE CAN ONLY FREEZE ACCOUNTS FOR 2 MONTHS**

1. After the parent fills out the cancellation form sign the form as the employee witness.
2. Write on the form what the date of the last two payments are. This can be found by looking up the contact and selecting the current membership. The payment date will pull up at this time.
3. Make a copy of the form. Keep the original copy and give the copy to the client.
4. If it is a freeze form go into the contact. You may have to look for which student if it is a family. It is normally the contact in the family who has trained the longest or if the family all started together it is the oldest member of the family. Once you find the contact that has the paying membership connected to it. select the active membership
5. The payments will come up. Select the payments that need to be frozen and forfeit those amounts. The payments will then pick up again on the payments not forfeited.
6. Place the form in the students hard copy file. Files are located in the front counter shelving unit middle bottom shelf.

If you are canceling a membership:

1. Select the X on the active membership and follow the prompts.
2. Then enter a new membership by pressing the Add Membership button.
3. Select the 60 cancellation membership.
4. Proceed with the membership process as described in the add new member section.

5. Select the check box entitled “ 60day cancelation”
6. Place hard copy for cancelation/ form in their file. Files are located in the front counter shelving unit in middle on the bottom shelf.

We Miss You Tasks:

- Print WE MISS YOU LIST
 1. Log into ULMAHQ.com and go to the CONTACTS tab
 2. Click on the LAST ATTENDED list on the left panel
 3. Click the student check box of the 1st student listed
 4. Scroll down until you have all of the students who we have not seen in 2 weeks.
 5. While holding the SHIFT key, Click on the student check box of the last student on the list (the effect should be that all of the check boxes are selected)
 6. At the top, click the PRINT option (this will open up a window)
 7. Scroll through documents until you find the document named: WE MISS YOU LIST
 8. Select that list and it will open in a separate tab
 9. Print the list
- Print Labels:
 1. Go back to the tab where all of the students are still selected and again click on the PRINT option.
 2. Scroll through documents until you find the document named: ADDRESS LABELS ULMAHQ 001
 3. Select that file and it will open in a separate tab
 4. Print on label paper (note: label paper goes face up in the printer)
- Assess and make notes on WE MISS YOU LIST:
 1. Next to each student's name, write the number for how many weeks it has been since the student trained
 2. Look through the last 2 WE MISS YOU LIST reports that were done by you or other staff and make notes on students still on the list.
 3. Scan through the quick notes and mark those students (it may be nice/necessary to drop those students an e-mail to check in)
 4. Assess who needs a call, who needs a postcard and who needs an e-mail.
 5. Make calls 1st

6. Label Postcards and take to UPS Store
7. Select students and send we miss you e-mail.
8. MAKE NOTES ON WHAT YOU DID ON EACH STUDENT TO REFER TO ON THE NEXT WEEK!

Mail Merge from Perfect Mind 3:

i.e. Creating labels

Browser version of Perfect Mind3

1. Open Perfect Mind 3 by logging in username ULMASTAFF (all caps) password ULMASTAFF (all caps)
2. On the menu bar hover over more and select documents from the drop down options.
3. Click on the Labels folder on the left hand side of the screen. Click and download “ Label Template”
4. Open template in word.
5. Return to documents
6. Check the box entitled MAIL MERGE.
 - If creating a list from contacts, leave MERGE OBJECT: as contact.
 - If creating a list from promotions, change MERGE OBJECT: to promotions.
7. Insert Mail merge fields as needed for example for a contact’s name you will want to select “ Insert Merge Field” button. The click on the title of the drop down box and change it to Contact (unless it is already selected)
8. Scroll down and select “ Full Name Simple”
9. To add to the template
 1. Repeat process for all information needed on the label.
 2. NOTE : you must include commas and spaces when adding fields to the labels.
 3. NOTE :

TO BE COMPLETED

Schedule someone for a birthday party:

ULMAHQ offers birthday parties on Saturdays after classes. Our parties are \$165.00 and they are 2 hours long. There is no limit on the amount of birthday party attendees. ULMAHQ provides 1.5 hours of entertainment with 30 minute for the family to celebrate with cake and presents. We have two time slots for birthday parties. Available times are 1-3 and 4-6. If other

times are requested approval will be needed from our party staff and a Marshad before a party can be booked. Our party staff needs to be informed when a party has been booked. To book a party:

1. Open Cozi and select the date from the calendar section.
2. If the date is free from other parties and other ULMA events add the party to the calendar.
 - NOTE : IF POSSIBLE FILL THE FIRST TIME SLOT FIRST.
3. Take down the child's name, age the birthday child is celebrating, parents name if not a member and a contact number
 - NOTE: IF THE CHILD IS A STUDENT A NUMBER AND PARENT NAME IS NOT NEEDED. OTHERWISE IT IS REQUIRED
4. If the child is a student no down payment is required. If they are not students a \$25.00 deposit is required to hold the time slot.

Ring up a sale on PM3

1. Open PM3 using the user name and password
2. Select the tab titled PRODUCTS
3. Select the product and or products needed. The product can be found quickly by looking up the item in the find field.
4. Hover over the Actions word to the right of the item and select add to cart.
5. Once all items have been added to the cart select the cart icon at the top left side of your screen.
6. Once on the cart screen you are ready to check out your client. Review the cart.
 - NOTE: THE CART WILL SOMETIMES HAVE ITEM THAT YOU DID NOT PLACE IN IT SO ALWAYS REVIEW THE CART
7. Adjustments can be made at this time to pricing, quantity, and discounts,
8. Place the name of the customer in the customer fields.
 - NOTE BE SURE THAT YOU ARE CHOOSING A CURRENT CUSTOMER
9. Enter the payment type into the pay now field.
10. If paying by CC select the correct card and have the client confirm the last 4 digits of the card. This insures no issues with the wrong card being charged.
11. If the client requests the pay later option select the date they want to be charged and the CC the payment will be charged to.

12. Proceed to process charge.
13. Once the CC has been processed (whether it be pay now or pay later) it will direct you to the receipt page. Giving you the option to email or print the receipt. Always choose print.
14. Once the print window appears you can either print or x off the print screen and email the receipt.

Scheduling a new student for a trial class

You answer an info call, or have a walk in and after following the script, they want to make an appointment:

1. Open Cozi and pull up the calendar .
2. Select the date and enter the appointment. class time, lead name, age, parent name , contact number.
3. Be sure that the appointment adds to the correct date.

Schedule a student for a private lesson

Private lessons can be placed on the calendar for any time in the hour before classes. A few lessons can be placed in while classes are in session (see private lesson schedule for available times these often correspond with floor two being open and having enough instructors to do the lesson)

1. Open a Cozi and proceed to the calendar.
2. Select the date then enter the time, name of student, instructor name, and a phone number (Mr. Mershad does not do private lessons unless he gives verbal approval)
3. Then set the alert so we are notified the day of the lesson

Create a 1-Call:

1. Log on to ULMAHQ.com
2. On the menu toolbar, locate and select PROMOTIONS
3. Select or create a list
4. Click the student select box of all students you would like to receive the call (note: to select many students, click the box of the student at the top, scroll down to the student at the bottom and while holding the SHIFT key, Click on the student check box of the last student on the list)
5. Scroll back to the top of the page and select the PRINT option
6. Scroll through documents and select: PHONE NUMBERS ALL
7. The numbers will appear in a new tab
8. Open a new WORD document

9. On the tab with all of the phone numbers, highlight and copy all of the phone numbers
10. Paste the numbers in the new WORD document (With more than 100 students you will have to repeat step 4-7)
11. In WORD, go to FILE, then SAVE
12. Name the document
13. Under FORMAT, scroll down and select PLAIN TEXT, and save the document on the document in a file that is easy to find.
14. Log on to www.call-em-all.com
 - Username:
 - Password:
15. Click CREATE A BROADCAST
16. Name the broadcast and click NEXT
17. Click on UPLOAD A FILE
18. Click SELECT FILE and find and select the file you saved
19. Click IMPORT TO BROADCAST
20. Follow the steps to get Phone Number and Pin to make call
21. Make call and follow the phone directions to save

Plan Classes:

1. Get an official class planner
2. Refer to the current [ULMAA Curriculum Packet](#) for week and daily themes
3. Get class/drill ideas:
 - ProMAC: <http://www2.professionalmartialartscollege.com/login.aspx>
 - Log In:
 - Password:
4. Write out drills in each section
5. Write in Class Goals at top right
6. Circle the PUMP Drill: The drill that makes the class worth coming to.
7. Post your planner at the front of the training floor. Greet parents with a hello and students with high fives. The goal is to create community and energize the students

Cleaning up an accident on the training floor:

The one time we are able to use our true ninja skills on the TKD floor. This operation should be as covert as possible. Only one employee is necessary

for this job. It is not a glorious moment for the student or for the person cleaning, but as we are here to build other up anything we can do to minimize the attention brought to the situation the better.

1. Inform the staff member behind the counter so they can help the student with a change of pants and parent notification.
2. Grab the blue rags (paper towels if necessary) and a trash bag to soak up the area. Place the soiled items in the trash bag. Then spray down the area with Odo Ban. This is a cleaning agent and a disinfectant. Mop the area if needed, but remember to do so drawing as little attention to yourself as possible.

Letting ULMA Know we are out of something:

Using CoZi Go to the section of shopping lists. Select the correct list either Sams or Office Depot and place a check mark on the item we are out of. If the item is not on the list add it at the bottom

Employee Check in/out method:

The iPad at the front of the TKD floor had the MY TIME STATION APP.

- Pull up the app
- Scan your card or enter your 4 digit pin. The cards can be found on the instructor station in the plastic bin. Your 4 digit pin is the month and year you were born. Example October 1978 is 1078
- Repeat the process when you leave work each night.

An item needs to be ordered:

The Cozi section for Shopping has a list names. ULMA Orders. Place the item needed in the list. This is items like sz 000 pants. Place the name of the student it is being ordered for and the date the order was placed. Orders are made twice each month.

Change the Credit Card on file:

Using PM3 go to the student who has the active membership.

- Select their name.
- On the sidebar pull up the finance tab
- Select the + to add a new cc

- Fill out the top section with the information required
- Swipe the card for the bottom section
- The computer will let you know this new card will be the default card.
- Double check this by checking to see if the default box is marked for the new card.