Example Playbook

A guide for employees: Managing your position effectively

Introduction

This Playbook is meant to provide new and existing employees with information about our company and client, best practices, retailer information, and lots of other great information that will help you in your role. Be sure to keep this Playbook handy for future reference.

Administrative Items

Acronyms

We use *lots* of acronyms on this program and with our company. Here is a list of the most common ones we use:

1:1 or **1-1**: One-on-one
AP: Accounts Payable
ASD: Assisted Sales Day – same thing as a demo day
BBB: Bed Bath and Beyond
BBY: Best Buy
CPM: Client Partnership Manager
MAP: Minimum Advertised Price
MI: Market Intelligence
MO: Merchandising opportunity
NTM: National Training Meeting
POG: Planogram
RM: Regional Manager
RSA: Retail Sales Associate (store employees)
RYR: Rock Your Registry Event (Bed Bath & Beyond)

Dress Code

The dress code should be adhered to for all store visits, events, demos, etc. While you should always be in dress code, please do not include any pictures of yourself in your reports if you are *not* in dress code.

- Black or white company provided polo shirt
  - Long sleeve shirts underneath are fine in cold weather but must be black or white
- Black, grey or khaki dress pants with a black belt
  - Khakis must be worn at BBB
- Solid colored black skirts may be worn
  - Black belt must be worn if there are belt loops
  - Must be knee-length or longer
  - Solid nude or black-colored tights or nylons must be worn

- Black or brown shoes
    - These can be sneakers or boots but must be solid black or brown
- Clothes should be clean and neatly pressed and appropriate for a business establishment
- Name tag must be worn and visible at all times
- No jeans or spandex legging pants
- Cosmetics and jewelry should be simple and professional
- All employees are required to maintain the highest standards of hygiene and grooming
- Facial hair should be well maintained and professional

Voicemail Setup

> "Hello, you've reached the voicemail of Kristy Lopez, Regional Manager for Yakima WA on the iRobot team. I am unavailable to take your call at this time. Please leave your name, number, and a brief message and I will get back to you as soon as possible. Thank you."

For full-time employees, once you have your company issued cell phone, be sure to set up your voicemail so callers can leave you a message. The above is an example of a voicemail script.

Market Store List

Your RM will send you out your individual market store list that will include several pieces of information, including:

- Retailer name and store number
- Store address
- Store designation
- Store rankings

<u>What is this document?</u>

This document should contain all the stores in your market that you are required to visit and the ***minimum*** frequency with which you should be visiting those locations.

<u>What should I do if I need to make updates/changes to this document?</u>

If you see something that is incorrect or should be added/deleted, please contact your manager.

<u>When should I use this document?</u>

This document should be used on a regular basis as you are routing yourself. It should also be used as an ongoing reference document.

<u>How do I use this document?</u>
As you are planning your daily/weekly/monthly routing you should be reference this document and ask yourself the following questions:

- Have I visited this location ***at least*** the minimum amount indicated per month/quarter?
- Where does this store rank within the chain and how does that information inform my visit?
- Am I giving this location the appropriate amount of in-store time (on a per-visit basis) and overall support based on what is indicated in the "Tier", "Designation" and "Ranking" columns?

Weekly Team Calls

We have team calls each week to review important information, ask for your feedback from the field, and to share important information with the client.

This is your time to shine! This is where you can speak up and share what you're seeing, ask for clarification on something, etc. We want to hear from you!

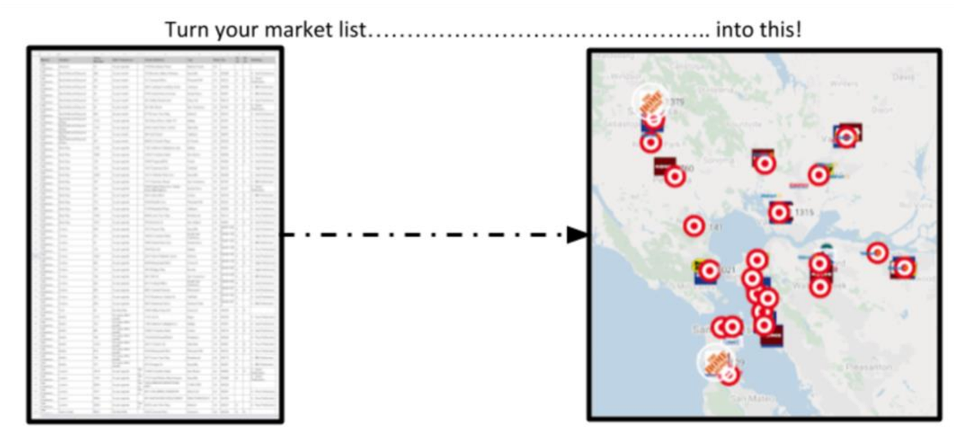
The calls are occasionally changed or canceled for various reasons. The information for the week's team call will be in the weekly newsletter.

The optional team call is just that, optional. It's definitely encouraged to join this call to connect with your teammates.

The mandatory team call is just that, mandatory. Be sure to be on time to each call and participate. If you can't make it to a call be sure to talk to your manager about it to be excused.

Google Maps:
Some team members utilize Google maps to help route visits more effectively and become a guide for routing in the future. Google maps allow you to save, list, categorize and map yourself to retailers on the fly. This helps reduce your Drive time and increases efficiency/productivity.

Please review this Google Maps – Territory Importing and Routing (link removed for example doc) document to familiarize yourself with how to use Google Maps to route your market.



Google Photos:
Some team members utilize Google photos as a way to keep track of changes in your market and in specific stores as they happen.

Systems Training

Admin Time

Amin time is available to our team to complete work-related items outside of work in stores. Full-time team members have 10 hours of admin time available per week, and our part-time team members have 5 hours of admin time available per week.

- Admin time should not be used to complete reports at the end of the workday.
- All admin time should be reported before midnight the same day the time was worked.
- Store visit reports and travel records should be completed in the field in real time to provide our client with real-time information and to mitigate excessive admin time and overtime.

Each admin report will require the question of how the time was used to be answered. Be as detailed as possible in your answer.

No: emails, calls, reports
Yes: read and answered emails, attended the regional team call, crafted and sent MI email about the new product in retail, worked on retail report for manager

If you are in need of additional admin time, please reach out to your manager for direction.

TEAMS

Our team uses the TEAMS system to store documents, for a variety of items, including:

- team and company chats
- storing company and team related documents
- group collaboration
- internal team calls

Be sure the TEAMS app is downloaded on your company issued laptop and on your cell phone and you're able to view the appropriate chats and groups – check with your manager for these.

Zoom

Our team uses Zoom for various team calls, both internally and externally. We ask our team to be on camera as much as possible during team calls, and even during 1:1 calls to create a connection with the person or people you're talking or collaborating with.

Sometimes conference calls can seem monotonous or sometimes intimidating. Having a little fun and personalizing your background for team conference calls can be an easy way spice things up, have a little fun, and to share your individuality with your team. This can make you more comfortable and able to be yourself so you can have the best call that you can. Studies show that Virtual backgrounds significantly raise the morale and productivity of video conference calls.

If you'd like to find out how to change your background, check out the below training video that includes:

- how to update Zoom
- how to enable / setup a virtual background
- tips and tricks to have a perfect background
- sources to point you in the right direction to create your own background

Training Recording: Virtual Background in Zoom Training (link removed for example doc)

Zoom Virtual BackgroundTraining Deck (link removed for example doc)

Product Training

Specific Product Training Recordings

In addition to the internal product training site, we host our own product trainings for our team. Below are the most recent training recordings. As part of onboarding, each new employee is asked to view both.

Product 1 Training Recording (link removed for example doc)
Product 2 Training Recording (link removed for example doc)

Minimum Advertised Price (MAP) Policy

MAP is a policy that the client has put into place to establish the lowest prices that our retailers are allowed to advertise our products. Our retailers are allowed to sell our products at a lower price than the MAP pricing, but they can't publicly advertise that lower price anywhere (i.e. in their weekly ad, online, etc.).

Field Information

How to Conduct a Visit

Conducting visits is the bulk of what our team does in stores. Each store visit will have its own training report. There are several things we do in every store visit:

Plan

- Have a plan prior to each visit

Vendor Log

- Always sign in and out of the vendor log and LILO
- Do not sign out prior to completing your visit

Management

- Connect with a manager upon arrival and prior to departure for the visit
- Agree on a plan for your visit and find out if there's anything you can do for the store
- Recap with the manager before you leave
- Setup expectations for your next visit

Responsibilities & Tasks

- Conduct product / category training
- Build relationships with RSAs and managers
- Merchandise the display
    - Clean the entire display (marketing funds can be used to purchase cleaning products)
    - Ensure everything is setup and working properly
    - Product is on the shelf, if applicable
- Find merchandising opportunities (MOs)

- New or existing
- Ask RSA and managers for MI about:
  - The store
  - The retail chain
  - The category
  - Our products
  - The competition

How to Conduct a Demo

A demo is an opportunity to really show what our products can do in the most "real-to-life" scenarios we can create. Not only do we demonstrate the functionality of the product, but we help customers see how it can fit into *their* lifestyle and make *their* cleaning tasks easier and more time efficient. Much like training, it's an opportunity to educate and inform – primarily shoppers, but also RSAs and managers. It's also the time to put our BRAND *visually* before customers in the most dominant and ubiquitous way possible, consistent with good taste and judgment. This is where we are selling our products in the most direct way we can.
Many of the same things we do in a regular store visit applies to the demo visit as well, such as logging into vendor logbooks and LILO, merchandising the display, etc.

Preschedule

- A demo is usually prescheduled with the retailer to best fit their schedule for a time when the most customer foot traffic is expected.

Rescheduling

If unforeseen events at a scheduled store prevent you from demoing:

- Notify your manager immediately by email containing: The store location, manager contacted and new scheduled date and time.
- Rather than cancel the demo altogether, try to go to a retailer that does not mind your doing an impromptu demonstration that same day.

Preparation

- Before leaving home, insure you have everything you need for a STELLAR DEMO.
- Besides your FULLY CHARGED products, make sure you have:
  - Retailer specific products
  - A table if you plan on using your own
  - Client provided demo items: rugs, banners, tablecloths, etc.
  - Extension Cord
  - Promotion Assets

When & Where

- You should arrive no later than 30 minutes prior to the scheduled demo. Allow yourself ample time for an orderly and complete setup.
- Choose a location in the store that provides the greatest exposure to the greatest number of shoppers possible, consistent with practicability.
- Avoid locations that will impede customer flow or block displays and always have a manager approve the location you choose BEFORE you set up.
- Choose a location that provides an accessible POWER SOURCE. It's best to know the layout of the store in advance and where power sources are.

Demo focus

- A demo will usually focus on a few models, but you CAN demo the entire lineup sold by that retailer if there are indications it will be productive, and if you have the floor space or table space to facilitate it. This will necessarily increase setup time a bit.
- Each demo should be designed to fit the retailers' needs, product lineup and available inventory.

Demo Setup and Execution

- Arrive at retailer at least 15 to 30 minutes ahead of scheduled time
- Upon arrival sign into specific retailer. (Lilo or Vendor Log)
- Locate manager on duty to let them know you are in store.
- Find a high traffic location that is conducive to the specific retailer.
- When setting up, do so in an *orderly and logical manner to minimize clutter*. For instance, if you're using a table, set it up first and cover it with the branded cloth immediately so you can use it as a staging area, keeping yet-to-be-placed items under the table and out of sight.
- Ensure that demo products, materials and assets are displayed neatly and are easily visible to consumers. Create *interest* when arranging your demo area.
- Try to build "eye-catching" arrangements of your demo area. Don't just "blend in".
- Place signage and banners in the most conspicuous and high-profile places permitted by the store to promote visibility.
- STAND OUT!

Customer Interactions

What is your Demo Flow?

- Greet EVERY CUSTOMER that passes cordially and professionally.
- Be engaging and enthusiastic!
- Put product into consumers' hands.
- Ask open ended questions and listen actively.
- Present benefits over features and discern what's important to the shopper.
- Tie in retailer specific promotions.
- Close the sale at the appropriate time. Don't keep selling.
- If consumer traffic is slow train RSA's.

Demo Wrap Up

Teardown

- Tear down your demo area in the same way you set it up with orderliness, minimizing visible clutter while you're working.
- Make sure upon packing up that your area in the retailer is the same way you entered.
- Merchandise remaining product on sales floor.
- Don't forget any items that you came in with.

Sign Out

- Check in with management staff before you leave.
- Gain feedback on sales, customer interactions, ask if there was anything that might have been missed at cash wrap.
- Please sign out. (LILO or Vendor Log)

Best Practices

- Call store 24 to 48 hours before your demo to confirm the date/time. Request best placement for demo area which includes access to electricity as well as product on endcap (if available.)
- Introduce yourself and our product(s) to managers.
- Ask managers to send any RSAs to you who need training.
- Talk to customer service associates and find out if there are any trends in product returns.
- Find out if store has any special programs going on (credit cards, extended store warranties, incentives etc.)
- **Make It Personal**: Create a real story about the product to showcase what it has done for you/your lifestyle.
- Be ready to answer questions about competitive differences.
- Be prepared to overcome objections and face rebuttals!
- Engage with existing customers who already own our products.
- Ask customers for photos (You can say it's for your call report, and won't be shared on social media).
- Recap your demo/sales with managers before you exit.
- **Have fun!**

Photo Best Practices

Taking and submitting photos in your reports are vital to telling the story about what is going on in your market and what you are doing in your market. Please review the Photo Best Practices (link removed for example doc) document for some tips & tricks to capture valuable intel in your stores with photos.

Key Performance Indicators (KPIs)

All of our team members have the ability to earn up to 100% of their yearly pay in bonuses per year, depending on the KPI metrics that are met by the employee and start date of the employee. Our KPIs change each two years, depending on overall program metrics and priorities.

As a field team we are expected to increase shopper brand awareness, RSA product knowledge, and ultimately SALES for our products. We believe that consistently doing the behaviors needed to meet the KPIs will do this for your market and create a successful program.

KPI – Key Performance Indicator AKA – Goals or metrics

Please review our current KPIs for 2028 (link removed for example doc).

Retailer-Specific Information

BBY Regional Appliance Training Events

We are asked to attend and execute various BBY regional appliance training events. Not every market will have one of these events each year. If one of these events are taking place in your market, your manager will reach out to you directly with dates, location, and instructions. Please review the Best Buy Appliance Trainings (link removed for example doc) document for more information on how these events should be executed.

Event Recaps

Our team conducts several types of events throughout the year. Some of these include:

- STEM events (tied to the KPIs)
- BBB RYR events
- BBB Pride Day events
- Sip & Scan events at Macy's

When these events are completed, be sure to complete a PPT event recap and send it to your manger. These recaps are shared with the client and can also be shared up throughout the organization, so it is important to double check grammar and spelling. It's important to also include the information and pictures in your reports. If you ever need samples of how to fill out an event recap, please reference an old newsletter and the attachments. Below are detailed instructions on how to fill out each slide of the Event Recap (redacted from this example doc). If you need additional assistance, feel free to reach out to your manager.

Event Template (link removed for example doc)

Acknowledgement of Receipt

Of Team Playbook

My signature below acknowledges that I have read, understand, and agree to abide by the guidelines, directives, and processes outlined in this Playbook.

It is my responsibility to keep track of and abide by any changes to any information herein after signing this page. I will receive updates from the leadership on our team and I can do this by accessing the Playbook in located in our digital library at any time. If I cannot access it, I can ask my manager for assistance.

______________________________________ ________________

Signature Date

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Printed Name