

STEP1 Worksheets

Audit Use of STEP1 in Each Department. Blank spaces allow you to set goals based on your company needs. Add important criteria learned in breakout sessions in the space provided below, then score each department based on percentage of attainment.

Sales

Customer Service

Action plan for sales technology (WSR, SUM, CSS, JM etc.)	One day's work entered in one day's time
Monitor and hold SalesReps accountable. (SalesMgr)	Efficiency: No writing down orders.
Promote strong product knowledge (ERA and On Point Reps)	Headsets? Two or more monitors?
Provide direction, reps need to know how to increase sales!	Using Reorders Due to help all customers and avoid callbacks!
Using Due For Reorder to increase sales & reduce delivery costs	Proper Plan/Use of Customer Self Service (CSS)
Proper Plan/Use of WebSalesRep	Proper Plan/Use/Support of Supply Usage manager (SUM)
Proper Plan/Use of CRM	Service Excellence: Customer's experience is more important than procedures
Orders entered same day, better yet real-time on a iPad or tablet!	Provide ways to increase product knowledge (ERA and On Point Reps)
Electronic Rep Assist – Train your Sales Rep!	
Dispenser Manager Used Regularly	

Avoiding Common Obstacles for Sales Department	Avoiding Common Obstacles for Customer Service Department
Go to Sales Manager, SUM & WebSalesRep	Go To:Order Flow to improve processes, Focus on the Customer to build team.
Score: _____ / _____ = _____ %	Score: _____ / _____ = _____ %

Repair Department

Uses machine history status
Using Service Manager to track turnaround times & Labor Hours
Using warranty claim tracking
One day's work entered in one day's time
Using service notes
Avoiding Common Obstacles for Repair Department
Go to Service Department Session
Score: _____ / _____ = _____ %

Shipping (Real-time Processing Very Important!)

Receiving (Real-time Processing Important!)

Use Check Run Stock Status

Avoids using Mark PO as invoiced option

Be sure to Mark Orders As Shipped (Real-time)

Receive PO's Real-time (even if not put-up, can be modified until end of day)

Print Pull Summary (Use as cover page for Picking Tickets)

Prints receiver before or when products arrive, verifies counts

Uses Print Run Shipping Documents

Prints receiver again when product is put-up and checks stock levels

Avoids printing Individual Pickings Tickets (except on large orders)

Reports discrepancies on stock counts

Avoiding Common Obstacles of Shipping Department

Avoiding Common Obstacles of Receiving Department

Go to Warehouse Manager

Go to Warehouse Manager

Score: _____ / _____ = _____ %

Score: _____ / _____ = _____ %

Accounts Receivable

Billing (No more than 1 day behind in Billing!)

One day's work entered in one day's time

One day's deliveries PROCESSED by end of next day (Important!)

Following up on collections calls*

Use Bill Truck Run and other batch options then edit exceptions

Uses & understands payment groups and groups statements

Multiple billing batches during the day, but one person issues invoices

Catch costing and commission issues before posting

Using STEP1's Order Review system effectively & Order detail tab!

* New AR Call Tracking Note! (Requires 7.37/SNAP Level 1)

Avoiding Common Obstacles in AR Department

Avoiding Common Obstacles in Billing Department

Go to Bookkeeping

Go Order Flow & Order Review

Score: _____ / _____ = _____ %

Score: _____ / _____ = _____ %

Purchasing

Inventory & Cycle Count

Following Recommendations

Know What & When to count

Adds all recommended then edits overrides/exceptions

Count after first big/mail pull of the day (less to count)

Knows how to setup PO Reorder Calculation Info

Don't count what has been pulled

Building all Drop Ship Purchase Orders

Submit stock level adjustments for damage etc. in a timely manner

Verifying costs with vendors, proactively correcting

Avoiding Common obstacles for Purchasing Department

Avoiding Common obstacles for Inventory Department

Go to Intermediate Purchasing

Go To Inventory Strategies

Score: _____ / _____ = _____ %

Score: _____ / _____ = _____ %

Accounts Payable

Accounting

A/P Invoicing: Using AP to PO reconciliation option

Financials accurate and in balance, knows how to audit AR, AP & IC values

Understands how to address/minimize AP to PO variances

Monitor A/R & A/P Balance Adjustment Activity (Confirm coded correctly)

Avoids marking PO's as invoiced (Use query to audit)

Journalize/Recognize Inventory Adjustments Periodically (Monthly)

Audit and address customer, vendor, and g/l reconciliation integrity checks

AP Checks: Using recommended payments

Bank Reconciliation up to date, Using interim accounts

Using recurring entries to save efforts on repeat transactions like payroll

Avoiding Common Obstacles in A/P Department

Avoiding Common Obstacles in Accounting Department

Go to Bookkeeping

Go to GL Flow

Score: _____ / _____ = _____ % Score: _____ / _____ = _____ %

Marketing

Management

Have an action plan!

Use SalesMgr, CEO & Dimensions, formulate and action plan from each use

Internet & Email Marketing plan is necessary

Learn to use query for ad hock reporting needs

Be aware/involved in CRM & Dimensions

Research strategic products from STEP1 & develop partners

JM Shopping Cart Web Site & Print Catalog Creator

Confirm staff are careful about criticizing management in software audits

88 Graphics Web Design & Constant Contact Campaigns

On Point reps-Video Manager

Avoiding Common Obstacles for Marketing Department

Avoiding Common Obstacles for Management Department

Go to Marketing Session, JM/ERA & OnPoint

Go to What Every Owner/GM Should Know, Sales Manager

Score: _____ / _____ = _____ % Score: _____ / _____ = _____ %

Information Systems

All Departments & Cross Department Strategic Products

Monitor System Status multiple times a day

Plan for SNAP Implementation & Training

Check backups daily

Plan for implementing Virtual Customer Catalogs

Liaison to STEP1 Support for your company

Plan for Price Management Strategy

Increase understanding of STEP1, mitigate confusion

Plan for Campaign Manager Dimensions

Cross Training Staff

Help customer who desired vendor managed inventory

Learn what you need to do every day

Confirm rebates are accurate and proactively setup/maintained

Go to Supervisor Responsibilities & System Health

Go to Bob's Strategic Products Class

Score: _____ / _____ = _____% Score: _____ / _____ = _____%

Other

Other

Score: _____ / _____ = _____% Score: _____ / _____ = _____%