LEVEL THREE TRAINING COURSE

Service Training
to become a

**Senior Wine Associate**
TRAINING GOALS

We've designed our training program to……

• Make you confident in being able to give the highest level of service to our guests.
• Enable you to handle store issues as they arise
• Increase your teambuilding and leadership skills
• Prepare you to assist with and lead daily store operations.

TRAINING FORMAT

Our training programs for the Associate, Wine Associate, Senior Wine Associate, and General Manager levels are organized into individual modules. During your training you will cover all modules. Come prepared with your training materials everyday and be flexible, as the training schedule may be modified to fit the shift. Electronic copies of your Senior Wine Associate manuals are available on the Training Resources Site. Your GM, RM, and the Learning and Development Manager will be tracking your progress through the material, but we recommend that you download your own copy of the Senior Wine Associate Training Checklist in order to take an active role in your development.

TESTING

After you have completed the training and homework for all modules, as well as the reading and discussion questions, you will schedule a test with your General Manager. In preparation for the test, be certain to read and study the modules carefully. The Senior Wine Associate Service Manual test will be graded by the Learning and Development Manager.

If you do not reach the required 80% pass rate, you must wait until the next quarter to take it again.

Passing this test is one of the requirements for promotion to Senior Wine Associate.
The Associate Development Program (ADP) career pathway map.
Vino Volo’s proprietary Training Program has been developed to ensure every associate provides our guests with a service level above and beyond that of other food and wine establishments:

**PROPRIETARY TRAINING FOR EACH LEVEL:**

- Associate
- Wine Associate
- Senior Wine Associate
- General Manager

**MODULES FOR EACH LEVEL**

- Cover different aspects of working in the store

**TESTS :**

- Must pass all tests before first non-training shift or promotion

<table>
<thead>
<tr>
<th>LEVEL 1: Associate</th>
<th>LEVEL 2: Wine Associate</th>
</tr>
</thead>
<tbody>
<tr>
<td>MODULE 1: Vino Volo</td>
<td>MODULE 1: POS System</td>
</tr>
<tr>
<td>MODULE 2: Offerings</td>
<td>MODULE 2: Advanced Operations</td>
</tr>
<tr>
<td>MODULE 3: VIP Service &amp; Salesmanship</td>
<td>MODULE 3: Opening/Closing</td>
</tr>
<tr>
<td>MODULE 4: Operations</td>
<td>MODULE 4: Teamwork &amp; Professionalism</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LEVEL 3: Senior Wine Associate</th>
<th>LEVEL 4: General Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>MODULE 1: Ctit &amp; Inventory Support</td>
<td>MODULE 1: Financial Management</td>
</tr>
<tr>
<td>MODULE 2: Talent Support</td>
<td>MODULE 2: Talent Development</td>
</tr>
<tr>
<td>MODULE 3: Administration Support</td>
<td>MODULE 3: Partnership Management</td>
</tr>
<tr>
<td>MODULE 4: Leadership</td>
<td>MODULE 4: Initiative Management</td>
</tr>
<tr>
<td></td>
<td>MODULE 5: The Business of Leading</td>
</tr>
</tbody>
</table>
At the Wine Associate level you learned a number of new skills but to reach the next position level you will have a new set of challenges. As a Senior Wine Associate you will assist the General Manager in the overall running of the store. Promotion to Senior Wine Associate is based on several factors; one is mastering the skills in the four modules of this manual. The others are related to business need.

Previous management experience can be helpful and may facilitate completing the modules more quickly but is not a requirement.

In this Manual you will cover the following topics:

1. Ctuit & Inventory Support

   - Complete monthly inventory with General Manager
   - Understand store performance and efficiency through Ctuit reporting
   - Process invoices
   - Research discrepancies and reconcile inventory

2. Talent Support

   - Knowledge of ADP process, training materials and tools
   - UltiPro Recruiting portal
   - Conducting 1st round interviews with candidates
   - Conduct and oversee New Hire Training for Trainees and Associates
   - Supporting a professional and motivational workplace

3. Administration Support

   - COGs Worksheet
   - Managing wine/flight changes (POS, Ctuit, Printed Materials and Merchandising)
   - Tracking and recording (Glass vs. Flight sales, weekly numbers, etc.)
   - Landlord management
   - Monitoring and reporting store issues
   - Monitoring store safety
   - Microsoft Office tools – Word and Excel
   - Monitoring Store Visit Report Self Assessments
   - Store library maintenance

4. Leadership

   - Building trust
   - Communicate effectively with team members and others both inside and outside the company
   - Understanding power
   - Wellness and self care through mindfulness and stress management

At the end of the training you will be required to take a comprehensive test. A passing grade is an 80% or above. Upon completion you will be considered “promotion ready” for Senior Wine Associate but promotion will also require that there be an opening for you to fill.
Vino Volo
Senior Wine Associate
Job Description

Job Summary:
The Senior Wine Associate leads the shift team in surprising and delighting Vino Volo customers through sophisticated customer service and wine expertise at the tasting bar, in the tasting lounge or in the retail section of the store. The Senior Wine Associate is responsible for assisting the General Manager with aspects of the day-to-day operation of the store. The primary goals of the Senior Wine Associate are to lead and coach his or her team to 1) impress customers with the quality of the Vino Volo experience; and 2) sell flights, glasses, and retail bottles of wine to these same customers. From time to time, a Senior Wine Associate may also be called upon to assist at another store.

Essential Duties and Responsibilities:

Lead shifts to deliver excellent customer service and maximize sales opportunities, including but not limited to:

• Deliver and coach employees to surprise and delight customers with a service level they have not experienced at an airport, and rarely ever encounter at stores or wine bars outside the airport.
• Engage customers in an approachable but sophisticated manner and help them to discover and fall in love with Vino Volo’s wines, making them want to buy these wines by the bottle.
• Create a relaxed, refined, and enjoyable environment for customers in spite of the stresses, noise, and crowds of the airport environment.
• Listen and empathize with customers, with a focus on gently and persuasively up-selling them on bottles of wine or enrollment in Vino Volo’s loyalty program and wine club.
• Collaborate with Associates and Wine Associates to ensure all customers are as happy as possible at all times, and all possible wine up-sale opportunities are captured.
• Help train new Associates and Wine Associates in Vino Volo’s approach to wine, service, and sales.
• Responds to customer complaints and feedback when necessary
• Ensure that all alcohol beverage control regulations are followed. Prevent under-age or intoxicated persons from being served wine at any time.
• Ensuring that the store is clean and well-kept
• Ensuring that the store is opened promptly and closed at the appropriate hour.

Assist the General Manager with store operations, including but not limited to:

• Assists with the product offering, including coordinating the wine selection process, and inventory process
• Assists GM with recruiting and training new employees
• Helps the GM keep the store in good repair, including coordinating with vendors to handle maintenance and repair if necessary
• Drafts store schedule for GM to approve
• Supports the GM in ensuring the store meets all necessary laws, codes and regulations including but not limited to local health codes and alcoholic beverage control codes
• Supports and assists with invoicing and other admin tasks in a timely manner
• Follows occasional directives and requests from the Landlord and the Airport Authority

Supervision Received and Exercised: Works under the general supervision of a General Manager. Leads shifts and assists with supervision at all other times.
ADP Level 3: Training to be a Senior Wine Associate

Introduction

Education and Experience Requirements: A four-year college degree is preferred, and two years of college education is required. Two to four years of total work experience is required in one or more of the following positions: manager or wine sommelier at a well-respected full-service restaurant, manager or server at a wine bar or winery tasting room, manager at a retail store, front desk manager at a hotel or equivalent position in the hospitality industry. All applicants must also be at least 21 years of age.

Knowledge, Skills and Abilities Requirements:
- Ability to lead and manage a team
- Knowledge of wines, including how to taste, evaluate, purchase and sell wines
- Skilled at and enjoys delivering excellent customer service
- Highly responsible and reliable
- Detail-oriented
- Experienced with and proficient at using retail point-of-sale systems
- Proficient in Microsoft Office suite of products
- 21 years of age or older (must be able to taste and evaluate product)
- Fully functional sense of smell and taste, needed to understand wines
- Ability to communicate in English effectively, both orally and in writing
- Able to carry and balance a tray of full wine glasses; able to lift and carry a standard case of wine

Diversity is extremely important to us. We recruit, hire and promote employees based on their individual ability and experience, in accordance with Equal Employment Opportunity, Department of Fair Employment and Housing, and Affirmative Action laws and regulations. Vino Volo does not discriminate on the basis of race, ancestry, color, national origin, religion, gender identity or gender expression, sex, pregnancy, genetic information, age, marital status, veteran status, sexual orientation, medical conditions, or physical or mental disability.
READING LIST

Required Readings:

1. This Manual
3. The 51 Percent Solution chapter within “Setting the Table” by Danny Meyer

- These books can be checked out of the Store Library
- The required discussion questions can be found on the Training Resources Site under the “Books” tab. Upon completion, submit to training@vinovolo.com for review.
As a Senior Wine Associate you will assist the General Manager with monthly inventory. You will also handle invoice processing, add new products to the system, and utilize Ctuit to ensure your store is performing optimally.

The module will walk you through the following steps:

- **Ctuit Basics** – How to set up and use your Ctuit Dashboard, run and read reports, and use them to understand and influence store performance.
- **Process invoices, add new product to Squirrel and Ctuit** – Many of the errors related to inventory are the result of incorrect and sloppy admin practices.
- **Complete end of month inventory with General Manager** – It will take several inventories with the General Manager before you are ready to lead the process.
- **Research discrepancies and reconcile inventory** – After conducting the physical inventory count you will have to research and rectify all discrepancies.
CTUIT INTRODUCTION

Ctuit Radar is a restaurant management software system that is intended to streamline restaurant operations and provide insight into financial and operational performance. We use Ctuit to help us understand store performance, as well as to create schedules and perform inventory.

Ctuit has an extensive library of user guides and videos to walk users through it’s many functions. We will be using some of these to help introduce you to key capabilities that you will need to be familiar with as you train to become a Senior Wine Associate.

Your General Manager will set up a personal Ctuit account that will allow you to practice the skills learned within this module and assist with store Ctuit functions.

In addition to this manual and the user guides and videos available on the Ctuit website, there is a Ctuit User Guide available on the Training Resources Site, which can be used for quick reference once you begin undertaking Ctuit tasks.

In order to access Ctuit throughout this module, please make sure you are in front of a computer before continuing. In order to access Ctuit, either click on the bookmark in your store laptop’s browser, or go to: https://radar.ctuit.com/CtuitNet/login.aspx

From here you can log in to Ctuit.

RADAR

**Ctuit Software**

![Ctuit Software Login](https://radar.ctuit.com/CtuitNet/login.aspx)

See what more Ctuit RADAR has to offer:

- Benchmarking
- Event Management
- Labor Scheduling
- On The Fly
- Manager Log
- Speed of Service
- Accounting
- Purchasing
- Inventory
- Prep Sheets
- Recipe Coding
CTUIT DASHBOARD

The Ctuit Dashboard is your starting point for navigation, as well as the place to gain at-a-glance information regarding your store’s performance displayed in various charts and graphs. You should check this frequently to keep up with changes in store performance.

When you first log in, Ctuit will bring you to the company’s standard Dashboard called Ctuit Standard (B) as you see it in the image below.

You will have a chance to customize your dashboard, but first let’s learn a little bit about how it works and the most important widgets for a SWA in training. If have not done so already, log into your Ctuit account and click on Training in the upper left-hand portion of the screen. It is circled in red on the image above.

On the next page, select Training Videos, as displayed and circled in red on the image to the right.
CTUIT DASHBOARD CONTINUED

You need to watch the Dashboard segment of the General Training (Comprehensive) video, found from minute 3:40 through minute 6:10, and the Dashboard segment of the Admin Config (Comprehensive) video, found from the beginning of the video through minute 3:45. Both videos are circled in red in the images below.

You will also need to review the Dashboard User Guide. This can be accessed from the main training screen, selecting Module User Guides, then selecting Dashboard, which are circled in red in the images below.

Anytime you view information on your dashboard, be sure to check the date. The current day’s sales may not been synced yet, and will register as zero, which will skew all calculations.
WIDGETS

Now that you understand how to navigate and configure your Dashboard, let's set it up. Using the knowledge you just gained, we will set up your first Dashboard with the most important widgets for a SWA in training. As you become more familiar with Ctuit, you are welcome to customize your Dashboard with the widgets that offer the most clarity to you. For now, let's start with these.

KEY NUMBERS WIDGET

You will be adding two of these widgets in total. Once you have added both to the Dashboard Editing Page, click on “Configure Advanced Setting”
In your first widget:

1. Select **PTD** from “Second Column” drop down box. This stands for Period to Date, and will show your sales month to date for the Date of Business (DOB) that you select.
2. Select **Forecast** from “Third Column” drop down box. This will show your projected sales for the DOB, allowing you to compare your actual sales versus projected sales.
3. Select **Normal** from “Variance” drop down box.
4. Select **Net Sales** from “Add Metric” drop down box. Select the Add button.
5. Repeat step 4 for:
   - **Check Avg** – This will show the average of sales per check to ensure we are maximizing sales opportunities
   - **SPLH** – This will show sales per labor hour to ensure the team is making the most of their time
   - **Guests** – This will show you the guest count
   - **Labor Hours** – This will display the amount of clocked-in labor hours for the particular DOB
   - **Labor %** - This will display the amount of money spent on labor as a percentage of net sales for the DOB.

In your second widget:

1. Select **QTD** from “Second Column” drop down box. This stand for Quarter to Date and will show your sales quarter to date for the DOB that you select.
2. Repeat steps 2-5 from the first widget.
TOP 5 SALE DEPARTMENTS WIDGET

This widget enables you to see your sales departments’ sales as a percentage of total sales. Certain departments, such as flight, are more profitable, overall. As a SWA, you may be asked to help track and report on the sale of profitable items in order to help increase overall store profitability. This widget does not require any advanced configurations.

APPROACHING OVERTIME WIDGET

This widget alerts you when a team member is approaching overtime. As a SWA, one of your responsibilities will be to assist the GM with monitoring store efficiency and profitability. As a SWA and shift lead, you will need to be able to make informed decisions regarding the store’s labor expenses.
This widget will let you easily track your net sales progress towards sales goals. Once you have added this widget to the Dashboard Editing Page, select “Configure Advanced Settings,” as you did with the Key Number widget.

In order to configure these gauges for our initial set up:
1. Select **Net Sales** under “Metric” for all three gauges
2. Select **Forecast** under “Compare To” for all three gauges
3. Select **Week** under “Period Type” for gauge 1
4. Select **Month** under “Period Type for gauge 2
5. Select **Quarter** under “Period Type for gauge 3
As you can see, this widget can display a variety of information. We will be using it to compare net sales and previous year (PY) net sales. This widget is helpful for understanding annual sales trends and can help us prepare for when we will need to adjust staffing and ordering. Once you have added this widget to your Dashboard Editing Page, you will need to select “Configure Advanced Settings.”

In order to configure this widget:
1. Check the box next to “Show Rolling Periods.” This will allow you to see the entire previous year, not just the year starting with January 1. This can help you understand sales from the previous year and what to predict in the coming year.
2. Select **Current Year and Last Year** under “Mode”
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ADP Level 3: Training to be a Senior Wine Associate
Module One: Ctuit & Inventory Support

WIDGETS CONTINUED

GIVE IT A TRY
Once you have your Dashboard set up with these widgets, review the data, their meanings, and how to apply that data with your trainer.

POLL STATUS
Ctuit automatically polls information from Squirrel on a daily basis after hours of operation. This allows it to gather a complete set of data once the business day has ended. Ctuit can miss data if the computer was shut down during its scheduled poll period or internet service was disrupted. In order for your sales, labor, payroll, and inventory data to be correct at mid month and end of month, it is important to verify that all data has polled using the Poll Status function. Access the Poll Status video under General Training videos and the Poll Status Guide under Module User Guides.

KEY INFO
Key Info is a function that has several similarities to our Key Numbers Widget, but gives you expanded capabilities for viewing store metrics and comparing more detailed information. View the Key Info Video under General Training from the beginning up to 1 minute and 10 seconds.

The Key Info page is the base page of the Key Info module. It allows users to instantly view a wide variety of data metrics for a single location, a location group, or the entire company. It also provides period-over-period actual versus budget comparisons for a selected metric. The page defaults to the most recent DOB (Date of Business) with Week and Period time frames displayed.
KEY INFO CONTINUED

Basic Usage

- **Location Group:** Select the location or location group for which to view information. **Note:** When the user permission “Allow all reports* for primary group?” is selected, the ‘Location Group’ drop-down will display all location(s) / location group(s) assigned under the “Primary Location Group” user permission.

- **Periods to Show:** Select the time frames for which to view information. Select from Week, Period, Quarter, or Year. Columns of information will be added for each time frame you select. You may select as many or as few time frames as you like.

- **Values to Show:** Select which values you would like to be displayed. Select from Actual Amount, Variance Amount, or Variance Percentage.

- **Date:** Select a date for which to view information. The page will default to the most recent DOB (Date of Business).

- **Metric:** Select the metric for which you would like to view information. The binocular icon that appears next to some metric selections indicates that the information for that metric has C-Thru (drill down) capabilities. The items in the grid for which you can use the C-Thru feature are underlined.

- **SET GOALS:** Selecting SET GOALS brings up an additional grid just above the main grid. Values or Percentages can be entered as targeted goals and minimum goals. If a value/percent in the corresponding column falls below the bottom (minimum) specified goal, it will appear red in the grid. If a value/percent in the corresponding column falls above the targeted (top) specified goal, it will appear green in the grid. Once all goals are set, select SAVE to save your goals.

- **SET METRIC AS DEFAULT:** After you select a metric, you can select this button to set the metric as the default metric that is displayed each time you navigate to the Key Info page. The default metric will display with red text.

- **SHOW:** Once you have selected your setup options, select SHOW to display the grid with the selected information.

- **PRINT:** Selecting PRINT will display a printable version of your grid. Note that the printed version of the grid can only include three period types.

- **EXPORT:** Selecting this button will export the grid to Microsoft Excel.
REPORTS AND CHARTS

The sheer amount of information available about your store can be daunting, especially when viewing the amount of Reports and Charts available. In order to further understand the basic functionality of Charts, review the Charts User Guide under Module User Guides.

The Reports module is RADAR’s primary reporting mechanism and contains over 190 business intelligence reports grouped into 10 main categories (Sales, Labor, Forecasting, Accounting, Site Administration, Inventory & Recipes, Employee Data, Event Management, AP & Contracts, and Manager Log). While many of these categories are included with the base RADAR package, others, like the Inventory & Recipes category, require additional add-on modules.

The categories are listed at the top of the Reports page in the blue toolbar. By default, the Reports page will display all Sales reports. To navigate to a different category, select the desired category tab.

If you would like a user to be able to view all reports on a single page, select the “Show available Reports without tabs” user permission for that user on the User Manager page or the Privilege Groups page in the Company Configuration module. This can be useful for users who only have access to a few reports.

Report Icon Key

A “Report Icon Key” is displayed on the right side of the main Reports page. This section identifies the following icons:

- 📏 - This icon will be displayed to the left of the report if the report is new within the last month.
- ⚒ - The hammer icon will be displayed if the report has been modified within the last two weeks. Note: To view a description of the change, hover your mouse over the corresponding report name.
- 📁 - The report icon is the default icon displayed to the left of most reports.
- 📺 - This icon will be displayed if the report compares two or more metrics, such as the Pmix Comparison Report or the Flash Report.

- 🎃 - The calendar icon will be displayed if the report displays a calendar. Reports that display a calendar include the Budget Calendar, Forecast Calendar, and the Event Calendar.
- 📈 - This icon will be displayed if the report displays a chart, such as the Hourly Metric Graph report or the Labor Metric Graph report.
- 📨 - This icon will be displayed if the report’s data is comprised of saved data. This icon is used for COGS (Cost of Goods Sold) related reports such as the Inventory Session Review report, Recipe Cost Report, and the Usage Variance (w/ Theo Usage) report.
ADP Level 3: Training to be a Senior Wine Associate
Module One: Ctuit & Inventory Support

REPORTS AND CHARTS CONTINUED

- 📑 - This icon will be displayed if the report’s data is comprised of posted data. This icon is used for COGS (Cost of Goods Sold) related reports such as the Ops Statement report, Theoretical vs Actual Cost By GL report, and the Ideal Vs Actual By GL Code report.
- ⛔️ - This icon will be displayed if the user does not have access to a specific report.

Recent Reports

Directly below the “Report Icon Key” section is the “Recent Reports” section. This section displays the last 10 reports that were run. The following information displays for each report: report name, location group, date range, and the day/time the report was run. To view one of these reports, select the underlined report name.

Note: The reports displayed in this section are only available until another data import occurs.

Report Description Tooltips

An icon 📑 just to the left of the Report Icon Key allows you to turn on/off report description tooltips. Turning on report description tooltips allows users to see a brief description of a report when they hover their mouse over a report name.

Running a Report

RADAR uses a four-step setup interface to make running a report with the desired filters extremely simple. To run a report, complete the following four steps:

![Image of RADAR interface with four steps: Choose Location, Choose Dates, Other Options, Run Report]
REPORTS AND CHARTS CONTINUED

1. **Step 1:** Filter by location or location group. **Note:** The User Manager page in the Company Configuration module can be used to limit a user’s permissions in such a way that the user can only access reports for locations in his or her primary location group. You can also use the “Report Privileges section of the User Manager page to limit the locations for which a user can run reports. See the User Manger page for more information.

2. **Step 2:** Filter by date or date range by either typing the desired dates into the fields or by selecting the calendar icons to navigating to the desired days. Alternatively, you may select ‘Weeks’, ‘Periods’, ‘Quarters’, ‘Years’, or ‘Pay Periods’. Upon selection, a list of time periods will be displayed for easy selection. You may also select ‘Current’ to set the date range to the current corresponding time period, or you may select ‘Last’ to set the date range to the previous corresponding time period.

3. **Step 3:** Filter by advanced options. The list of available filters will depend on which report you are running. Refer to the help file, which can be viewed by selecting the ‘Help’ link at the top left corner of the page, for more information on each advanced option. **Note:** If the “Cannot show advanced options” user permission is selected for a user in User Manager, he or she will not be able to view or select any advanced options.

4. **Step 4:** Select the report format in the ‘Format’ drop-down field. PDF, EXCEL, RTF, TXT, or Email Report are all available for selection. Select RUN REPORT to run/email the report. If you selected the “Excel” format, a link will be displayed upon processing the report. Select the link to open the report in Microsoft Excel. **Note:** The ‘Select multiple & merge’ function only works with the PDF and Email options.

The following have been identified as the most useful and basic reports and charts for a SWA in training to be familiar with.
**THEORETICAL ITEM COST DETAIL**

This report displays the quantity sold and price for each item in the chosen item group and compares with theoretical cost. The information displayed on this report allows you to determine the popularity of items and their profitability.

1. Select the Reports Icon
2. Select the Theoretical Item Cost Detail report under the Product Mix Report heading
3. Select your location, dates, change sort order to “margin,” and change show net or gross to “show net”
4. Run Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Qty</th>
<th>Avg Price</th>
<th>Net Rev.</th>
<th>Avg Cost</th>
<th>Total Cost</th>
<th>Margin</th>
<th>Cost %</th>
<th>% of Dept. Sales</th>
<th>Velocity</th>
<th>Margin</th>
<th>Contrib.</th>
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<tr>
<td>FLT-SOMM SERIES-31</td>
<td>29</td>
<td>19.00</td>
<td>551.00</td>
<td>4.03</td>
<td>134.35</td>
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<tr>
<td>FLT-FALL INTO CAB-31</td>
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<td>17.00</td>
<td>1,549.30</td>
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<td>242.82</td>
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<td>18.91%</td>
<td>23.96%</td>
<td>1</td>
<td>1</td>
<td>2</td>
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<tr>
<td>FLT-HOUSE OF CHARDS-31</td>
<td>30</td>
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<td>600.00</td>
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<td>639.43</td>
<td>12.02</td>
<td>14.55%</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Qty** – Total amount sold in time range given  
**Avg. Price** – Average price to the guest  
**Net Rev.** – Amount of money (net) generated by sales of the item  
**Avg. Cost** – Average cost of one of the items to the store  
**Total Cost** – Quantity x Avg. Cost = Total Cost – Amount of money the total items sold cost the store  
**Margin** – Price – Cost = Margin - Amount of money the store makes on one of an item  
**Cost %** - Cost of goods sold (COGS) – Lower cost % = high profitability  
**% of Dept. Sales** – Amount sold as a percentage of the total sales department  
**Velocity** – Ranks quantity sold from most to least  
**Margin** – Ranks margins from highest to lowest  
**Contrib.** – Compiles total report factors and ranks items from best to worst contribution to a store. An item can have a high margin, but a high cost %, decreasing its’ contribution to the store. The best items have high margins and low cost %
FOUR R REPORT

This report provides a graphical display of each item’s margin or cost % vs. quantity sold and includes a chart to quickly identify details for each item. This a useful tool for identifying opportunities to boost profitability.

1. Select the Reports Icon
2. Select the Four R Report under the Product Mix Report heading
3. Select your location and dates
4. Change metric to “cost %,”
5. Select your Master Sales Department and Sales Department
6. Run Report

<table>
<thead>
<tr>
<th>#</th>
<th>Menu Item #</th>
<th>Menu Item Name</th>
<th>Total Order $</th>
<th>Total Qty Sold</th>
<th>Average Qty Sold / Order $</th>
<th>Cost $</th>
<th>Cost %</th>
<th>Margin $</th>
<th>Total Margin $</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GRL-PGRG-TERRE-DERL-PASCLIT</td>
<td>2,178.00</td>
<td>272.00</td>
<td>17.00</td>
<td>8.00</td>
<td>1.54</td>
<td>18.91%</td>
<td>8.58</td>
<td>113.14</td>
<td>Retain</td>
</tr>
<tr>
<td>2</td>
<td>GRL-SAVI-DASHWOOD-NZ</td>
<td>3,072.00</td>
<td>298.00</td>
<td>16.00</td>
<td>12.00</td>
<td>1.74</td>
<td>14.46%</td>
<td>10.28</td>
<td>184.24</td>
<td>Retain</td>
</tr>
<tr>
<td>3</td>
<td>GRL-MALBC-SURANDINA-RAYMIAR</td>
<td>2,310.00</td>
<td>210.00</td>
<td>13.13</td>
<td>11.00</td>
<td>1.30</td>
<td>11.83%</td>
<td>9.70</td>
<td>127.29</td>
<td>Retain</td>
</tr>
<tr>
<td>4</td>
<td>GRL-ITALF-POTTORIA-CHARANT</td>
<td>1,446.00</td>
<td>191.00</td>
<td>10.00</td>
<td>9.00</td>
<td>1.45</td>
<td>10.27%</td>
<td>7.54</td>
<td>75.03</td>
<td>Retain</td>
</tr>
<tr>
<td>5</td>
<td>GRL-OTHIR-ACITEA-MONASTIES</td>
<td>1,176.00</td>
<td>147.00</td>
<td>8.00</td>
<td>8.00</td>
<td>1.27</td>
<td>15.92%</td>
<td>6.73</td>
<td>81.88</td>
<td>Retain</td>
</tr>
<tr>
<td>6</td>
<td>GRL-PDON-TRINITY-HL-NZ</td>
<td>2,070.00</td>
<td>138.00</td>
<td>8.85</td>
<td>15.00</td>
<td>2.17</td>
<td>14.46%</td>
<td>12.93</td>
<td>110.87</td>
<td>Retain</td>
</tr>
<tr>
<td>7</td>
<td>GRL-CHARD-STAR-MONT-STANLEY-CA</td>
<td>1,742.00</td>
<td>134.00</td>
<td>8.36</td>
<td>13.00</td>
<td>2.46</td>
<td>18.90%</td>
<td>10.50</td>
<td>85.32</td>
<td>Reprice/Replate</td>
</tr>
<tr>
<td>8</td>
<td>GRL-CSAU-ROND-POND-KITH-CA</td>
<td>2,032.00</td>
<td>114.00</td>
<td>7.13</td>
<td>16.00</td>
<td>4.54</td>
<td>24.10%</td>
<td>13.00</td>
<td>97.34</td>
<td>Reprice/Replate</td>
</tr>
<tr>
<td>9</td>
<td>GRL-OTHIR-O-RISSEON-POPOU-FR</td>
<td>900.00</td>
<td>99.00</td>
<td>8.13</td>
<td>10.00</td>
<td>1.74</td>
<td>17.08%</td>
<td>8.28</td>
<td>50.93</td>
<td>Retain</td>
</tr>
<tr>
<td>10</td>
<td>GRL-CHARD-MARKEN-CA</td>
<td>1,246.00</td>
<td>93.00</td>
<td>8.10</td>
<td>15.00</td>
<td>2.17</td>
<td>14.48%</td>
<td>12.93</td>
<td>86.58</td>
<td>Retain</td>
</tr>
<tr>
<td>11</td>
<td>GRL-CSAU-AURELIAN-CA</td>
<td>1,230.00</td>
<td>92.00</td>
<td>8.13</td>
<td>15.00</td>
<td>2.17</td>
<td>17.30%</td>
<td>12.40</td>
<td>53.54</td>
<td>Retain</td>
</tr>
<tr>
<td>12</td>
<td>GRL-MERLO-VENTE-FAMIL-BERLAN-CA</td>
<td>980.00</td>
<td>90.00</td>
<td>8.00</td>
<td>11.00</td>
<td>1.67</td>
<td>7.98%</td>
<td>10.13</td>
<td>59.90</td>
<td>Reprice/Replate</td>
</tr>
<tr>
<td>13</td>
<td>GRL-CHARD-ROMEBAUER-CA</td>
<td>1,422.00</td>
<td>79.00</td>
<td>4.84</td>
<td>10.00</td>
<td>3.80</td>
<td>21.08%</td>
<td>14.10</td>
<td>99.03</td>
<td>Re-Think</td>
</tr>
<tr>
<td>14</td>
<td>GRL-BORD-CU-PERRAINE-GRAVES-FR</td>
<td>1,292.00</td>
<td>78.00</td>
<td>4.76</td>
<td>17.00</td>
<td>3.26</td>
<td>19.14%</td>
<td>13.75</td>
<td>85.30</td>
<td>Re-Think</td>
</tr>
</tbody>
</table>

**Total Order $** - Amount of money in sales generated by each item over the course of period selected

**Total Qty Sold** - Amount of each item sold. The list is ranked from most sold to least sold.

**Cost %** - Cost of goods sold (COGS) – Lower cost % = high profitability

**Margin $** - Price – Cost = Margin - Amount of money the store makes on one of an item

**Action** – Listed as either Retain (good combination of popular and profitable), Reprice/Replate (popularity and profitability out of sync), or Rethink (not popular and/or not profitable). This corresponds to the green, yellow, and red flags on the left hand side of the report and in the graph. This can help us identify items that we should be pushing more and items that should be replaced with a more profitable item.
FLASH REPORT CONFIGURABLE

This displays a customized view of the activity that you want to compare by selecting up to 12 metrics and custom date ranges. Much of this information can be found in the widgets we discussed earlier. However, this report allows for more detailed and concise analysis.

1. Select the Reports Icon
2. Select the Flash Report Configurable under the Restaurant Sales heading
3. Select your location and dates
4. Select which metrics you would like to view
5. Run Report

<table>
<thead>
<tr>
<th>Net Sales</th>
<th>Labor</th>
<th>Net Sales</th>
<th>Labor</th>
<th>Net Sales</th>
<th>Labor</th>
<th>Net Sales</th>
<th>Labor</th>
</tr>
</thead>
<tbody>
<tr>
<td>32,609.57</td>
<td>5.8%</td>
<td>29,802.83</td>
<td>6.2%</td>
<td>32,186.14</td>
<td>6.4%</td>
<td>28,967.97</td>
<td>6.0%</td>
</tr>
<tr>
<td>32,609.57</td>
<td>5.8%</td>
<td>29,802.83</td>
<td>6.2%</td>
<td>32,186.14</td>
<td>6.4%</td>
<td>28,967.97</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

The report above compares the net sales and labor % over the course of four consecutive weeks. We created this report by utilizing the custom dates option. From this data, we can analyze how well the store adjusted labor in response to fluctuating sales.

ITEM BREAKDOWN CHART

This chart displays, either in a pie chart or a donut chart, items broken down by dollar amount. This can be done for sales, comps, voids, and promos. It helps determine which items generate the most sales or to track down items that may be contributing to high comps due to quality.

1. Select the Charts Icon
2. Select “Item Breakdown” under the “Items” heading
3. Select your location
4. Skip selecting your dates. Go down to Step 3, and select your Period.
5. Go back up to Step 2, and select the dates within the Period that you would like to view
6. Go back down to Step 3. Select which Metric you would like to view
7. Select the Sales Department
8. Select your Chart Type
9. Click on “Show” to run report
From this graph we can visually see that there are two flights that make up the larger percentage of revenue generated by flights, one of which is the Shades of White. This shows that the most expensive flight is not always the biggest revenue generator. When we look to the chart below, we see the flights ranked by net sales produced. We can see that quantity is not always an indicator of amount of money generated.
INVOICING

Ensuring correct and timely invoice entry is one of the first steps to maintaining an accurate inventory and, ultimately, controlling your store finances. Missing or incorrect invoices could result in:

1. Missed or incorrect payments to vendors
2. Inaccurate inventory numbers and values
3. Extra work for you, your GM, and our Accounts Payable team as we try to pinpoint the reason for discrepancies

Along with the duty of entering store invoices comes responsibility for store finances. Your GM needs to be able to rely on you and trust you to do it accurately and consistently.

INVOICING - PLATEIQ

PlateIQ provides our invoicing system. This provides the basis for vendor payments and our Accounting team uses it for determining store finances. As a Senior Wine Associate, you will have access to PlateIQ. However, for training purposes, your trainer may give you limited access to the account in order to train you how to use this system.
The process for uploading invoices in PlateIQ is as follows:

1. You can upload invoices by:
   a) Scanning the invoices and emailing them to your store’s PlateIQ email address (vinovolo(store#)@invoice.plateiq.com)
   b) Scanning the invoices, logging onto PlateIQ via a web browser on the store laptop, and selecting “Upload”
   c) Downloading the PlateIQ app and taking a picture of the invoice with the app.

2. Keep the scanned invoices in a file/folder for reference for a few days. PlateIQ takes about 24-48 hours to process or read the invoice.
3. 1-2 days later. Login to PlateIQ and approve your invoices using the paper copies you have in your folder.
4. Review all the invoices in the "Needs Attention" tab for actions you may need to take. Accounting will address the "missing vendor" or "missing item mapping". You need to address the "Blurry invoice" issue by uploading a new invoice or attaching a new copy in the PlateIQ invoice.

5. Some of your vendors may have your PlateIQ email address and email invoices directly to it. This saves you the step of scanning your paper invoices. Accounting won’t pay any invoice until you approve it. If the vendor sends you an invoice you don’t agree with, FLAG the invoice in PlateIQ, and Accounting will delete it. (You must contact the vendor to get a revised invoice.)

6. When you receive a statement, make sure all the invoices on it are in PlateIQ. If they are not, contact the vendor to get the missing invoice copies. Upload them to PlateIQ.

7. Don't upload US Foods or Fintech invoices. Accounting uploads US Foods invoices. Fintech sends their invoices directly to PlateIQ. You want to use the paper copies you receive as a guide when approving the electronic invoices.

Accounting exports approved invoices on Wednesday and cuts checks on Fridays. If your store wants an invoice paid on Friday, it needs to be uploaded and approved by Wednesday morning. Invoices should be uploaded and approved at least on a weekly basis.
INVOICING – PLATEIQ CONTINUED

The process for approving invoices is as follows:

1. Wine & food invoices. Make sure the date of the invoice is in the month it was received. (You may get a 9/30/16 dated invoice that wasn't received until 10/1.) If the date needs to be changed, click on the FLAG button, make a note and Accounting will change the date. You can still approve a flagged invoice but it can't be uploaded until the flag is cleared by the team or Accounts Payable.

2. Fintech invoices: You need to check your paper copy against the electronic copy.

3. Check item mapping, especially for vendors from which we purchase several expense categories of items such as wine AND beer.

4. If you notice that you need a credit memo, you must contact the vendor to get a credit memo. Upload it to PlateIQ.

5. You will see invoices to approve that you did not upload. For example, Accounting may have sent it in if it came directly to them, or the vendor may have sent it in. You still need to approve these too.

Important Deadlines:
All invoices from the prior month, must be uploaded by the 1st of the following month and approved by the 3rd. For example, all September invoices must be uploaded by 10/1 and approved by 10/3.

⚠️ Do not upload statements, packing slips, or sales orders, as these can cause duplicate payments

GIVE IT A TRY
Practice entering invoices into PlateIQ with your trainer.

INVOICING - CTUIT

Though the majority of our stores were able to integrate PlateIQ and Ctuit invoicing procedures, some of our stores were unable to do so entirely due to the way certain products are paid for. If your store enters some invoices into Ctuit manually, prior to entering any invoices with your trainer, you should review the following two resources.

1. Access the Ctuit User Guide, which can be found on the Training Resources Site, under the Training Documents tab. Review the sections on "Entering Invoices into Accounts Payable," “Entering Taxes, Fees, and Other Controllable Costs,” and “Posting Invoice Batches”

2. Access the Ctuit Training Videos. Review “Entering Invoices (Simple)” under the Accounts Payable heading

GIVE IT A TRY
Practice entering invoices into Ctuit with your trainer.
INVENTORY OVERVIEW

We keep a lot of valuable inventory in the store including wine, food, and merchandise. Each item is carefully counted regularly to ensure that we are not losing items (called “shrinkage”). Here is a general overview of how inventory is tracked. Keep your Ctuit User Guide available for reference.

Accessible on the Training Resources Site under the Training Documents tab.

WHAT IS COUNTED & WHEN

We count everything in the store that is available for sale—wine, beer, non-alcoholic beverages, food and merchandise. We do not count any other items. Everything must be counted between close of business on the last day the monthly inventory cycle and the following morning before the store opens. This is called the “month-end inventory” and is critical for generating our financial statements. Month-end inventories can never be missed or late for any reason.

A store may be put on a more frequent inventory cycle (weekly or even daily) if shrinkage becomes a problem.

COST OF GOODS SOLD

The most important measure of inventory is cost of goods sold (or “COGS”). COGS is precisely what it says it is— the total cost of all the goods that we sold over a particular period of time. For example, if we sold 100 bottles of Silver Oak Cab over a month and each bottle cost us $75, our COGS would be $7,500 for that period.

We use Ctuit to track our COGS. This program derives two calculations of COGS and compares them. Any difference is a “variance” that we must explain. The two calculations are:

- **Actual COGS**
  
  \[
  \text{Actual COGS} = \text{Beginning Inventory} + \text{Purchases} - \text{Ending Inventory}
  \]

- **Ideal COGS**
  
  \[
  \text{Ideal COGS} = \text{The total cost of each item sold, based on our actual sales & a “recipe” we enter for each item}
  \]

Any difference is analyzed.
EXAMPLE

Let’s say you have a store that sells just one item – a glass of Silver Oak Cab for $30 per glass. Over the course of the month, the store sells 100 glasses. The store starts with an inventory of 10 bottles, purchases 24 at a cost of $75 per bottle and ends with an inventory of 11 bottles. The glass is 5.5 ounces and a bottle is 25.2 ounces (750 ml).

Ideal COGS

In the ideal world, you would consume the exact amount of Silver Oak to fulfill each order and nothing more. First, we need to calculate the cost of each glass. This is simply:

\[
\text{Cost per glass} = \frac{\$75 \text{ per bottle}}{25.2 \text{ oz per bottle}} \times \frac{5.5 \text{ oz per glass}}{} = \$16.36 \text{ per glass}
\]

Then, the ideal COGS is:

\[
100 \text{ glasses sold} \times \$16.36 \text{ per glass} = \$1,636
\]

Actual COGS

To calculate actual COGS, we apply the formula on the previous page:

\[
\text{Beginning Inventory + Purchases} - \text{Ending Inventory} = (10 \text{ bottles x } \$75/\text{bottle}) + (24 \text{ bottles x } \$75) - (11 \text{ bottles x } \$75) = \$1,725
\]

Oops! Our Actual COGS is higher than our Ideal COGS. This means that we used too much Silver Oak in the course of serving those 100 glasses. The reasons could be numerous – we’re over-pouring, we’re wasting (throwing out bottles with wine that has expired), we miscounted our inventory. Whatever the reason is, you will be expected to explain large variances each time you do an inventory.

CTUIT

Having painful flashbacks to your high school math classes? Don’t worry; Ctuit tracks our inventory. It does all the math for you. All you need to do is make sure your inventory counts are 100% accurate, enter them into Ctuit, keep your recipes updated, and it will show you at the click of a button what your variances are. You’ll get lots of practice during your in-store training.

Recipes: It is CRITICAL that you keep your recipes updated in Ctuit. This is the most common cause of inventory variances. EVERY time you change a wine or rotate a flight on the menu, you must update the flight, taste, glass and bottle recipes in Ctuit. Stay on top of this or you will quickly find yourself doing daily inventories. See the “Managing Recipes” section of the Ctuit User Guide for details on how to do this.
COMPLETING STORE INVENTORY

You will do a complete inventory as part of your in-store training. Doing a complete inventory can take 2-4 hours depending on the size of the store and its offering. The Operations Manual and the Ctuit User Guide have step-by-step instructions for preparing, counting, and entering inventory. As a Senior Wine Associate, you will be responsible for leading and assisting with inventory.

Here are the general steps:

1. Make sure all items to be counted are present in your Ctuit Storage Locations and that prices are correct.
2. Make sure all invoices and credits have been entered into Ctuit and PlateIQ.
3. Create and print Taking Sheets.
4. Count all items.
5. Enter inventory counts in Ctuit

Here are some general tips for successful inventories:

**Team Up:** Do counts with two people – one to count the item and the other to record it on the count sheets.

**Be Specific:** Are you counting bottles or cases? Pounds or ounces? Watch out for those 6-bottle cases! They can trip up your math.

**Count Corked Wine:** Count all corked wine that has not yet been replaced by the supplier. You can keep a corked wine list to help you.

**Count by Location:** Count by location, not by item. That is, count everything on a shelf, then move to the next shelf. Do not try to count all of one type of bottle then move to the next bottle. You’ll lose track of what you’ve counted.

**Use Tare Weights:** Create tare weights for common storage containers. For example, if you store food in stainless steel pans, create a tare weight for each pan so you don’t have to weigh each one.

**Count all locations:** Make sure you count items in all locations – did you include display niches, other retail displays, closets and storage areas, under the bar, etc?
ANALYZING VARIANCES

Small usage variances are to be expected in our business – no one prepares the same item in exactly the ideal way each and every time. However, large variances are a cause for concern. There are many reasons why variances might occur. The following is a partial list of things you might consider when researching variances.

SHRINKAGE (we have less than the ideal amount)

- Miscounted inventory (count too low).
- Missing credits from vendors.
- Recipe incorrect in Ctuit.
- Over-pouring or over-portioning.
- Waste / spoilage (often caused by over-ordering for food or opening too many bottles of wine).
- Customer or team member theft.

GROWTH (we have more than the ideal amount)

- Miscounted inventory (count too high).
- Missing invoices from vendors.
- Sales not synced from POS.
- Recipe incorrect in Ctuit.
- Under-pouring or under-portioning.

COMMON CTUIT INVENTORY MISTAKES

1) Unit of Measure errors, seen commonly in food. Possibly due to incorrect purchase amounts entered, where case vs. each is disregarded.

2) Items missing from the taking sheet. No item name, count or cost for them included. This could be due to failure to enter an invoice or creating a new product in Ctuit too late in the month. This will give a misleadingly low-end count, which will drive COGS up.

3) Blank Costs on the ending inventory reports. In this instance, the SKU name is included, along with a quantity count of over zero, but the cost is either missing or zero. This will also drive COGS up, as it is inaccurately reducing the ending inventory $ total.

4) Entire Categories Missing. For example, Merchandise missing from ending inventory reports, where neither the category or the items are listed.

5) Price typo, with someone queuing in $200 per wine bottle instead of $8. This may be done in either the AP module or Quick Cost.
CTUIT INVENTORY ACTIVITY TOOL

The Ctuit Inventory Activity Tool is an excellent way to review pricing, purchases and sales prior to posting inventory. You can use the tool to locate problems and drill down to begin trouble-shooting (recipes not linked, invoices not posted, VPIs not assigned). After the fixes are done, request a price update from the Ctuit Ops Team.

This can be accessed by selecting inventory from the tool bar, then selecting “Inventory Activity” from the Tools drop down menu.
CTUIT INVENTORY ACTIVITY TOOL

- **Location**: Select the location for which to view inventory activity.
- **Start/End Date**: Select a start date and end date by either entering the desired date into the fields or by selecting the calendar icon(s) and navigating to the desired day.
- **Inventory Item**: To search for a specific inventory item, enter the name of the item into this auto-fill field. As with all other auto-fill fields, selections that match your typed information will appear as you type.
- **Inventory Item Group**: To search for items in a specific inventory item group, enter the inventory item group name into this field.
- **GL Codes**: All GL Codes will be selected by default; however, you can filter the inventory items displayed by one or more specific GL Codes by selecting. This will open the “Select GL Codes” window where you will be able to select one or more GL Codes. Be sure to select OK to save your selection(s).
- **Show Excluded**: Select whether or not to view inventory items that have been tagged as “Exclude From Inventory”.
- **Inventory Cycle**: Select an inventory cycle.
- **Show Items that belong to this Inventory Cycle only**: If you select this option, the table will only display the inventory items that are associated with the selected inventory cycle. If an inventory item is associated with more than one inventory cycle, it will not be displayed on the table if this option is selected.
- **Rows per Page**: Adjust the size of the Inventory Items table by selecting the number of inventory items to show per page. **Note**: The default number can be altered on the Inventory Settings page.
- **Show**: Select to view the results that match your search criteria.
- **Export**: Select to export your search results to Microsoft Excel.

The Inventory Items table displays the following information: GL Code, GL Name, default taking unit, current price, beginning quantity/amount, ending quantity/amount, purchase quantity/amount, sold quantity, theoretical cost/sales usage (theoretical) quantity/amount, the variance in quantity and amount, and exclusion status. Also, the last row of the table displays a total for each column. Theoretical information is only available for locations utilizing the Recipes module.
CTUIT INVENTORY ACTIVITY TOOL

- **Current Price:** If you select a current price, a “Price Information” window will appear that essentially displays a reproduction of the Price Check page. Select ‘Go To Price Check’ to be navigated to this page. For more information about the data displayed in the “Price Info” window, see the Price Check documentation. To close the “Price Info” window, select the grey x icon.

![Price Info Window](image)

- **Begin Quantity/Amount:** If you select a value in the “Begin Quantity” column or the “Begin Amount” column, a “Price Info” window will appear that displays the previous cycle’s inventory session information.
  - **Inventory Session:** If you select the inventory session number at the top of the “Price Info” window, you will be automatically navigated to the Inventory Session Details page for the selected session.

- **Purchase Quantity/Amount:** If you select an amount in the “Purchase Quantity” column or the “Purchase Amount” column, a “Price Info” window will appear that displays all purchases made within the selected date range, by invoice number.
  - **Invoice:** Selecting an Invoice number in the “Price Info” window will automatically navigate you to the Invoice Details page for the selected invoice.
  - **Batch:** Selecting a Batch number in the “Price Info” window will automatically navigate you to the Invoice Batch Details page for the selected batch.

- **Sold Quantity/Theo Cost:** If you select an amount in the “Sold Quantity” column or the “Theo Cost” column, a “Theoretical Amount” window will appear that displays all items sold within the selected date range, by inventory number.

![Theoretical Quantity Window](image)

  - **Recipe:** If you select a recipe, you will be automatically navigated to the Recipe Details page for the selected recipe.
Check it Each Night: Make sure your closers are checking punches each night. They know best who worked what hours on their shift. Punches should also be verified in Ctuit each day. You should not have to make any adjustments at all at the end of the pay period if everyone is doing their job properly.
HOMEWORK ASSIGNMENTS

Please complete these questions on a separate piece of paper or computer document. This homework assignment is to be submitted to training@vinovolo.com.

1. What is the name of the dashboard you created to practice setting up widgets and running reports?

2. For the following questions regarding your Ctuit Dashboard, use the most recent month for which you have a full month of data. For example, if it is October 28th, use the month of September. Use the Key Numbers PTD to answer the following questions:
   - Which month’s data are you using?
   - Select the second Thursday of the month as your DOB.
   - What were the net sales on that DOB?
   - What was the variance between the PTD sales versus the Forecasted sales?
   - What is the check average PTD? How does this compare to the previous full month’s check average? How does this compare to the previous year’s PTD on the second Thursday of the month?
   - What is the labor % PTD? How does this compare to the previous full month’s labor %? How does this compare to the previous year’s PTD on the second Thursday of the month?

3. For the following questions regarding your Ctuit Dashboard, use the most recent mid-quarter month for which you have a full month of data. For example, if it is October 14th, use the month of August. Use the Key Numbers QTD to answer the following questions:
   - Which month’s data are you using?
   - Select the second Thursday of the month as your DOB.
   - What is the variance between the QTD sales versus the Forecasted sales?
   - Are you on track to hit or exceed quarterly sales? If so, what other metrics can you focus on to increase profitability? If not, what can you do to try to boost sales in order to hit your Forecasted goals?
   - How does your SPLH PTD compare to your SPLH QTD? What could be contributing to the difference? If it is lower, what could you do to increase it?

4. For the following questions regarding your Ctuit Dashboard, use the most recent month for which you have a full month of data. For example, if it is October 14th, use the month of September. Use the Top 5 Sale Departments widget and the third Saturday as your DOB to answer the following questions:
   - Which month’s data are you using?
   - What are your top 5 sales departments?
   - What percentage of your total sales does each represent?
   - Which department is more profitable than your #1 department?
   - What could you do to promote sales in that department?

5. What time did your most recent Poll complete? Which date is this information for?
6. Using Fridays as your DOB, find the last week in which your store had team members approaching overtime.
   - Which widget did you use to find this information?
   - Which date did you have team members approaching overtime?
   - If you had known this information, what could you have done to avoid potential overtime hours?

7. Set your DOB for yesterday. Use the Weekly Net Sales line graph to answer the following questions:
   - Which date did you set as DOB?
   - Is your store following the same overall sales patterns as PY?
   - Is there any date at which this year's sales diverge from the sales pattern? Pick one and explain how it diverges and some potential reasons why.
   - How did you determine the answer to the previous question?

8. Using the Key Info function, set your DOB to the last day of the previous month, select period as your “Periods to Show,” set Values to Show as “Actual Amount,” and set Metric to “Check Avg.”
   - Which month’s data are you using?
   - What is your check average PTD?
   - What was the previous month’s check average?
   - What is the variance between the two months?
   - If it is higher, what could be the cause? If it is lower, what could the store do to increase it?

9. Run a Theoretical Item Cost Detail report for the last full month of sales.
   - Which month’s data are you using?
   - Which flight has the lowest cost %?
   - What is it’s velocity?
   - What could you do to increase it’s velocity?
   - What effect would this have on the store’s profitability?

10. Run a Four R Report for the last full month of sales.
    - Which month’s data are you using?
    - Were there any Glasses categorized as Reprice/Replate in your top ten sales items?
    - What were they?
    - What could you do about making that a more profitable item?

12. Use the Item Breakdown Chart to answer the following questions for the last full month of sales:
    - Which month’s data did you use?
    - Which food item generated the most net sales?
    - Which food item did you sell the most of?
    - Which food item generated the least net sales?
    - Which food item did you sell the least of?
After completing this module, you should know how to:

- Analyze store profitability using Ctuit
- Complete end of month inventory with General Manager
- Process invoices
- Research discrepancies and reconcile inventory

SENIOR WINE ASSOCIATE TEST

Once you have finished the training, homework, and discussion questions for all Senior Wine Associate modules, you will be able to schedule a test with your GM during the quarterly open testing period. On the following page you will find a practice quiz on the information contained in this module. The test may include questions on information provided by any of the content in this module, including videos and articles.

If you do not reach the required 80% pass rate on your test, you will be able to retake it during the next quarter’s open testing period. A passing grade on this test is one of the requirements to be considered promotion ready for a Senior Wine Associate position.
**PRACTICE QUESTIONS**

The following questions are examples of the type of information that will be required of you on the exam. It should be noted that these questions may or may not be asked. You will be expected to show competency over the entire module.

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<table>
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<tr>
<td>1</td>
<td>What is a Tare weight?</td>
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<tr>
<td>2</td>
<td>How many people are required to do inventory and why?</td>
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<tr>
<td>3</td>
<td>When should invoices be entered?</td>
</tr>
<tr>
<td>4</td>
<td>When are punches certified and verified in Ctuit?</td>
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<tr>
<td>5</td>
<td>What does the Theoretical Item Cost Detail report show?</td>
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<tr>
<td>6</td>
<td>What might be the problem if you are short exactly 12 bottles of a wine?</td>
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<tr>
<td>7</td>
<td>List the steps you should take to prepare for inventory.</td>
</tr>
<tr>
<td>8</td>
<td>What does the Four R report show?</td>
</tr>
<tr>
<td>9</td>
<td>If you just completed inventory and realized you are missing an invoice from last month, how should you date the invoice when entering it?</td>
</tr>
<tr>
<td>10</td>
<td>What does the Item Breakdown Chart show?</td>
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TALENT SUPPORT: MODULE OVERVIEW

As a Senior Wine Associate you will be involved in the hiring and training process at the store. You will assist the General Manager during the recruiting and selection phase as well as play a pivotal role in the orientation, training and development of all new hires for your location.

This module will teach you how to:

• **Do the 1st round interviews with possible candidates** – For many, this will be the first time you are involved in recruiting and interviewing candidates; there are a few Human Resources “dos and don’ts” you will need to know.

• **Communicate knowledge of ADP process, training materials and tools** – Understanding the steps and process will help you lead a new Associate through Onboarding and on the path to becoming a Wine Associate. There are many tools at your disposal and being familiar with each will facilitate the training process.

• **Conduct and oversee New Hire Training for Trainees and Associates** – As a Senior Wine Associate you will help mentor new Associates and Wine Associates as they grow with the company.
A talented and dedicated workforce is one of the keys to Vino Volo’s success and growth. The process, from deciding to hire staff through training, is lengthy and intricate. Frame a timeline and start early enough that your staffing coverage and development are not weakened. Although timelines are tailored to individual teams, airports, and regulations, here is the basic model:

Sample Timeline

Day 1: Create open position in UltiPro
Day 1-5: Call respondents and referrals to set up initial interviews.
Day 2-6: 1st Round Interviews.
Day 7-10: 2nd and 3rd Round Interviews.
Day 12: Extend Offer(s).
Day 13: Background check (through UltiPro)
Day 14: Airport fingerprinting and badging paperwork.
Present the Handbook and Associate Training Manual.
Day 21: Badge pick up
Day 22-29: Six training shifts.
Day 30: 1st tipped shift.

Although this process can be slightly truncated, it can also take longer due to lack of qualified respondents, delayed badge approval, and training schedule. Never limit yourself only to those candidates from the first batch of responses. Always leave time to look harder and find the right hire.
RECRUITING CONTINUED

Here are some places you can start looking for the right candidates:

• **Referrals** – Talented people usually know other talented people. Your current team is usually a great source for leads. If you trust the source of the referral, you will have much more information on your candidate from a referral than from a ‘cold call’ interviewee. If a trusted, current Vino Volo team member is referring an old colleague that he knows to be competent, reliable, and passionate, you may have a ‘sure fit’ after a very short interview process. Vino Volo offers a $200 referral bonus to the referring team member if we make a hire. Details are in the Employee Handbook.

• **Local Restaurants & Hotels** – Whenever you dine out or have friends who stay in a local hotel, you should be scouting for talent. Is there a star waiter or front desk manager who wowed you? Why not exchange business cards and tell them more about where you work?

• **Local Tasting Rooms** – If your store is located near a wine region, you have a local source of people who love wine.

• **Industry Events & Contacts** – Portfolio tastings are a great time to talk up Vino Volo and what we have to offer as a company. When we are actively hiring, our local wine distributors and representatives can be a great word of mouth resource to others in the industry.

• **Job Board Postings** – UltiPro will post all job openings on Indeed, Glassdoor, and multiple other free job sites. Specialized job boards, such as Poached can also be used but you will need to post the ad. The most current version of the ads for Associates, Market clerks, and Back of House positions can be provided by HR (hr@vinovolo.com).

• **Social Media** – With tools like Facebook, Twitter, and LinkedIn, the industry is more connected to ever. Let the world know we are hiring! These posts are easy for people 2 or even 3 connections removed from you to share with someone who might be a perfect fit.

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**Plan Ahead**: As you can see from the timeline at the beginning of this section, the process will take a few weeks at best. It is also a smart idea to keep a few applicants on file that you can call from the last round of interviews if someone doesn’t work out or if you need to shave a little time off of the process. Let them know you may have a position in the near future and you will notify them first if something comes up; likewise, they can call you every few weeks to see if there is an opening on the horizon.
**UltiPro**

When an open position is created in UltiPro, an ad will be generated and posted to multiple job boards including Indeed and Glassdoor. If you also want to post an ad on a job board outside of those used by UltiPro, the ad should direct applicants to apply by going to the Field Retail and Food and Beverage Careers section of the Paradies Lagardere careers page (https://www.paradieslagardere.com/careers). Detailed instructions on how to create an open position in the Recruiting portal in UltiPro can be found in the Recruiting User Guide for Hiring Managers.

As candidates apply to the position, their applications will be available in the Recruiting portal in UltiPro. A detailed description of the steps that must be followed in the hiring process can also be found in the Recruiting User Guide for Hiring Managers.

After reviewing the candidates’ applications and selecting those who seems promising, the next step is to set up a first-round interview.

**SCREENING**

When you are meeting a candidate for the first time, there are some things for you to consider. Keep in mind that a candidate does not have to have to meet or exceed every single qualification on your list – what we’re looking for is an overall dedication to customer service and passion for the brand. You will have to evaluate the total package to see if they fit.

Some qualities to look for in a candidate:

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<tr>
<th><em>Friendly, personable, outgoing</em></th>
<th><em>Passionate about wine with a better than average knowledge of the subject</em></th>
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<tr>
<td><em>Have restaurant or retail wine experience</em></td>
<td><em>Well-groomed, neat</em></td>
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<tr>
<td><em>Mature, responsible</em></td>
<td><em>21 years of age or older</em></td>
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<tr>
<td><em>Positive and enthusiastic</em></td>
<td><em>Able to work overtime or late into the evening in the event of flight delays</em></td>
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<tr>
<td><em>Genuinely wants to help people; sophisticated and attentive to customer service</em></td>
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<tr>
<td><em>Able to handle potentially stressful situations when store is very busy</em></td>
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SCREENING CONTINUED

Previous applicants and team members: If the candidate has indicated that he or she has worked for Vino Volo in the past, you should find out when and at what store. You should be particularly careful with past applicants and team members. Typically, these people left the company or were screened out of the candidate pool for a reason. If you decide that you still want to hire this candidate, you will need to contact HR before extending an offer.

INTERVIEWING

Hiring the right people for your team and our company is crucial to success. No matter how short staffed you are, hiring a body to fill shifts will never work out in the long run. That person will either quit because this isn’t the right fit, or you will need to go through the lengthy administrative process of progressive discipline in order to separate them from the company. Either way, they are sure to bring the morale and standards of the team down. This is why it is imperative to always be scouting for potential candidates.

Interviews are an important step in determining candidates who will be an asset to the store and the team. However, not all interviews are created equally. Most people have sat in a traditional interview, in which the same canned questions are asked, and responses prepared and given.

“Tell me about yourself. What are some of your strengths? What are some of your weaknesses?”

These types of interviews have been proven to be only 10% predictive of job performance. It is easy for a candidate to prepare the responses they think you want to hear. These interviews do not give you any real insight into a candidate’s character, behavior, or ability to interact with your team. If we are going to hire and retain the right candidates, we need to get out of the traditional interview rut!

The following resources contain important ideas and information on planning and conducting an effective interview:

“How to Hire Without Getting Fooled by First Impressions”
“How to Take the Bias Out of Interviews”
“Interview Techniques That Get Beyond Canned Responses”
“Recruiting for Cultural Fit”

These four articles are available on the Training Resources Site under the Articles tab, under the topic “Interviewing and Hiring”.

“The Hire Attitude: Attract and Retain Better Talent”

This report is available on the Training Resources Site under the Training Documents tab, in the SWA folder.
INTERVIEWING CONTINUED

Some of the key takeaways from the above resources are:

- Follow the same format and ask all candidates the same questions to make it easier to compare responses
- Take notes – it is easy to confuse details when interviewing several different candidates
- First impressions are important, as it reflects what our guests will experience. However, in the more extensive day-to-day interactions and operations of your store, first impressions are not enough to make the candidate a good fit. Be clear about what skills and attributes you are looking for before you interview.
- Interview for cultural fit, in addition to skills and experience

**Diversity:** Diversity is important to us. Vino Volo does not discriminate on any of the following basis, so be sure to **NEVER** ask a question about:

- Marital Status or Pregnancy
- Age
- National Origin
- Sexual Orientation
- Veteran Status
- Religious affiliation
- Ethnicity
- Disability

**Open ended questions:** Open-ended questions are questions that cannot be answered with a single-word answer such as “yes” or “no”. For example, “You worked for the Cheesecake Factory for two years?” is not an open-ended question. The candidate will probably answer “yes” and you really won’t have learned a lot more about them. In contrast, “Tell me the best and worst thing about working for the Cheesecake Factory” is an open-ended question.

INTERVIEW PROCESS

After you have completed the interview, collect all the appropriate paperwork and notes to give it to your GM. After the SWA has completed the initial interviews and determined potential, eligible candidates, the GM will need to conduct a final in-person interview and make final hiring decisions with the approval of the Regional Manager.

As a SWA in training, you will be accompanied by either the SWA or GM in any initial interviews you give. As a new SWA, the GM will likely sit in on the interview with you as well. This is a great opportunity for your trainer to give you real life feedback regarding your interview skills, outside of the practice role playing you will do. After this joint interview, your GM may either ask the candidate to stay for further questions, or ask them to come back for a second interview.
INTERVIEWING PROCESS CONTINUED

**First Round:** It’s best to have the 1st round in the store so that the candidate can get a better feel of who we are and what we do. In many locations this is not possible due to escorting rules. This interview is 75% information about the company and 25% about the candidate.

**Second Round:** This round is almost 100% candidate information. Specifically, the interviewer should take any ‘flags’ from the first round and dive into them. This interview should be conducted by the GM. This is a good time to pay attention to both what the candidate answers and how they answer:

- Are they comfortable conversing with you in a ‘high pressure’ situation?

- When they speak about wine, do they speak naturally about varietal, regions, and styles, or are their answers contrived and forced?

- Do they speak of old colleagues and bosses as if the relationship was natural and beneficial or do they bring up negative points about their former employment.

The second round is also a great place to see if the candidate is not only qualified, but a good ‘fit’ for Vino Volo. Specifically, the team approach to all aspects of store function is something that may not appeal to all candidates. For example, former managers or wine reps may not adjust well to mopping the store. It won’t matter how qualified your candidate is if they don’t want to be doing what they’re doing.
Sample Interview Agenda Outline (1st Round)

Welcome
Introduction (your position, history w/ company).

Explanation of the Timeline
Explain that this is a first interview and one more will follow: face to face with GM.
Give the approximate date we are aiming to make the offer(s).
Explain the badging process and how long this may take.
Explain the in-store training and testing prior to inclusion in the tip pool.

Explanation of the Position
Hiring for Associates (entry level in our company).
Both FOH (server, bartender) and BOH (line cook, dishwasher) work.
Opportunity for advancement: Plant and Grow
Development-minded company/team.

Company Philosophy/History/Growth
Brief Company Philosophy
Make Wine Approachable (knowledgeable, not intimidating servers)
Wine By Flights

Brief Company History
Founded in 2004
First store was opened in Dulles in September 2005
Most recent additions, announced openings

Daily Life
Variable shift times/lengths. (Store specific, 7 – 12 hours, 365).

Kitchen
Extensive prep/plating done in our kitchen [Show Menu.]

Wine Program
Wine arranged by flight.
Explain Core List vs. Discovery List. [Show Lists.]
Team selection process for wines. Tasting process incorporates ongoing training.
Tasting Notes written in house based on team feedback.
Patented Tasting Notes [Show Notes.]

Candidate’s Situation
Current Employment
Reason for addition/replacement of current employment
Location/commute. (The airport adds time to a normal commute)
Desire for advancement
Flexibility to travel/move

Candidate’s Restaurant History
Discuss highlights and potential problem spots in Work History. Don’t voice any of the reservations mentioned below. Simply encourage to discuss their experiences candidly. Then segue into how that might or might not translate easily into the life of a WA.

Potential problems:
lack of restaurant experience
gaps in employment
frequent shifts in employment
Sample Interview Agenda Outline (1st Round) Cont.

Candidate’s Restaurant History Continued

Highlights (and potential flags):
- Wine (too focused on impractical ‘wine philosophy’?)
- Fine-Dining (unable to adapt to informal, fast pace?)
- Bartending (too brash/unpolished for reserved setting?)
- Management (unable to take a step back to Associate?)

Discuss candidate’s future ambitions and how they think this history will aid those goals.

Candidate’s Wine History

Discuss how they came into their interest in wine. As an experienced wine professional, you can easily determine (as you would with a customer) the level of their wine knowledge, simply from listening to them discuss wine.

- What are some favorite wines?
- Where is their ‘wine-knowledge’ strength?
- Is wine a driving factor in their career path? Do they have wine-specific ambitions?

** Be cautious of too much wine-specific conversation. Our recruiting draws out individuals interested in using Vino Volo as a launching point to become some off-the-floor Wine Director/Consultant. This is not a realistic goal for these candidates, and it is important that we not make it appear so.**

Compensation Details

- Wage + Tips + Bonus
  - Wage: $x/hr
  - Tips: Pooled between all team members (besides GM) Average tips/hour (store specific)
  - Bonus: Up to $x/hr based on store performance (feedback, sales, waste control), awarded quarterly

- 401K (No Match)
- Health and Dental (NOT FOR P/T!)
- PTO at a rate of 2 weeks a year for first year
- Wine Retreat (Napa, Sonoma, Willamette Valley, Santa Barbara)

Wrap Up

- Any questions from them?
- Detail how the process will progress from this point. We will call them to set up a 2nd Interview
- Make sure you have adequate contact information.
- Thanks and Goodbye.

GIVE IT A TRY

Practice asking some behavioral interview questions and walking through a full length 1st round interview with your trainer.
CHECKING REFERENCES

Even if you have found what you think is a perfect candidate, it is very important to check at least two of their references (more is better). People can spin a good story about themselves, but the real test is what others say about them.

It is not only good business practice for you to check references, it is a critical step in protecting the company from liability. Hiring team members who pose a threat to other team members or customers (through violent propensities or just simple incompetence) can put the company at risk of a lawsuit. The best way to protect the company, your team, and your customers is to do a thorough check of references.

Do not be shy about calling their references – if they are good references, the people you call will be eager to talk about them.

GIVING REFERENCES

You must be very careful about giving references to past team members. The law is very restrictive about what we can say. All requests for references should be referred to your GM, who will need to contact and confer with HR before proceeding.

MAKING THE OFFER

All offers of employment should come from the General Manager. Once you have cooperatively determined a great candidate, the GM will contact them to offer the position. Once the offer has been accepted, the candidate will undergo a background check in UltiPro (this usually takes 24-72 hours). When the background check has been cleared, the candidate can be officially hired.

Badging paperwork should be started as soon as the candidate has accepted the position in order to minimize lag time between the offer and when they can start training.

ENTERING TEAM MEMBERS INTO THE POS SYSTEM

After the onboarding process for the new employee has been completed in UltiPro, the employee will be assigned an employee ID number.

Your next step will be to enter the team member into the POS system using this employee ID, so he or she can punch in and out. The Operations Manual contains step-by-step instructions for doing this.

GIVE IT A TRY

Practice entering team members into the POS with your trainer.
TRAINING

Vino Volo has developed a special training program for each level of associate development. This program is designed to take the team member through the entire length of training. You have already worked through the Associate and Wine Associate levels. As a Senior Wine Associate, you will be instrumental in ensuring that our new hires progress through their training efficiently and effectively, and that our Associates and Wine Associates receive the support they need to progress through their development programs.

You should refer to the “Training Policies and Tools” guide on the Training Resources Site under the Training Documents tab to ensure you fully understand the Training Program policies and tools.

Associates

If you are the shift leader, you will be in charge of taking new hires through the module they are working on that day. It is vital that you be familiar with our training program, and while you will have gone through a similar training program, it is important that you keep up to date with any changes. Make a point of reading through the relevant training materials in advance of the trainee’s shift.

You will be responsible for making sure the trainee completes each item and task on the Associate Training Checklist that corresponds to the training module they complete on your shift. If for any reason they are unable to complete certain tasks, please note these on their Associate Training Checklist for follow up on their next shift.

Each Associate in Training should have a physical training file that includes:

- Associate Training Checklist
- Homework assignments
- Graded Associate tests

Wine Associates

Associates who wish to become Wine Associates have an indefinite amount of time to do so. When the General Manager and Regional Manager determine that an Associate is ready to begin Wine Associate training, they will send the Associate’s name and email address to the Learning and Development Manager. The Learning and Development Manager will send them a welcome email, with information and details about their training along with their training checklist.
Wine Associates (continued)

In addition to the homework and discussion questions that are required, there is a lot of hands on training that needs to occur in the store. You should review the Wine Associate Training Checklist to gain an understanding of the training and skills that are required by the Wine Associate training. If you engage in any of the training on the checklist, you should inform your General Manager, so that they can update the Wine Associate Training Checklist.

Senior Wine Associate

Once the General Manager and Regional Manager determine that a Wine Associate is ready to begin Senior Wine Associate training, they notify the Learning and Development Manager who will send them an email with details on their Senior Wine Associate training along with their training checklist:

Once you are promoted to Senior Wine Associate, you will play a role in the hands-on aspects of training a Senior Wine Associate in training.

PROMOTIONS

As a Senior Wine Associate in training, you know that Plant and Grow is one of our core values and an integral part of our operations model. We want to ensure that our promotion process is based on transparency, fairness, and selecting the right person for the position in question. All of our internal openings for SWA, GM, and RM will be posted on the Training Resources Site, under the Opportunities tab. In order to be considered for a position, you must submit a cover letter and resume to elyn.willy@vinovolo.com. Selected candidates will have at least two interviews with two of the following: Learning and Development Manager, Regional HR Manager, Regional Manager, General Manager, or Senior Director of Operations. All applicants must be considered promotion-ready for the position for which they are applying.
A main part of your responsibility is to lead your shift. This not only entails guiding your team to give outstanding service, but also ensuring that you and your team maximize all sales opportunities.

MOTIVATING YOUR TEAM

As a Senior Wine Associate, it is your responsibility to motivate your team when leading a shift. You want to make sure that everyone on your team is giving their best performance, so that customers are enjoying the best possible experience at our stores, and there are great store sales.

Make sure everyone knows that it is a team effort, and if they perform well as a team, everyone will be rewarded. Especially note when someone has done a great job and gone above and beyond the already high service standards here at Vino Volo. Let the General Manager know of individuals who you think deserve spot bonuses by speaking to them directly or leaving a note in the Manager’s Log.

Review the following articles on motivating teams. They can be found on the Training Resources Site, under the Articles tab, in the Leadership topic.

“Match your Motivational Tactic to the Situation”

“To Motivate Employees, Do Three Things Well”

In addition to everyday performance motivation, as a SWA, your GM may ask you to assist in developing and implementing games or contests to help motivate the team towards meeting a particular sales goal. In these situations, it is important to get them excited about either the process or the reward and keep the team apprised of their progress.
MOTIVATING YOUR TEAM CONTINUED

Different people and teams are motivated by different things, which generally fall two categories of motivators: extrinsic and intrinsic. Extrinsic motivation occurs when we are motivated to perform a behavior or engage in an activity to earn a reward or avoid punishment. A sales contest with a bonus bottle as the prize is an example of extrinsic motivation because the team or individual is engaging in enhanced sales strategies because they want to win the reward. Intrinsic Motivation involves engaging in a behavior because it is personally rewarding; essentially, performing an activity for its own sake rather than the desire for some external reward. Reading a non-required leadership book because you want to do a great job as a new SWA could be an example of intrinsic motivation.

It is important to get to the root of what motivates your team collectively and individually. A contest that motivates the team as a whole to earn a joint reward may not be as effective as a contest between team members if you have numerous competitive personalities on the team. For them, the excitement of the competition and the fun, friendly banter, along with the prize may be a fantastic combination of intrinsic and extrinsic motivators that will keep them engaged. However, if your team is not very competitive, and generally enjoys working together to achieve a hard-earned goal, a team competition would be a better fit. When working individually to help develop your team members, talking to them about their personal motivations will give you insight into how you can help make this a rewarding place to work. A Wine Associate who enjoys his job because he loves wine may welcome the opportunity to attend industry tasting, whereas a Wine Associate who enjoys her job because she wants to learn about management may appreciate the opportunity to discuss the concepts in the books that are part of our training program. A combination of extrinsic and intrinsic motivators has the potential to keep your team engaged in the success of the store and their own personal growth.

COACHING

“Coaching is correction with dignity. It’s helping people refine skills, showing how to get the job done, and truly wanting employees to reach their peak potential.”

--Danny Meyer

You are responsible for helping to develop the skills of the Associates and Wine Associates at your store; this includes enhancing the skills they have started to learn from their training program through situational coaching and feedback. Pay particular attention to how they deal with customers, talk about wine, and approach sales situations. You will also need to address areas that the Associates find more challenging.

We discussed giving feedback in the Wine Associate manual. By now, you should be comfortable giving feedback to your team members as a way to build a supportive team that is continually working to hone its skills. As a Senior Wine Associate and leader, your experience and insight will carry even more weight; use it wisely!
COACHING CONTINUED

Always be sure to:

- Give feedback that is both constructive and specific. Don’t just point out what they are doing wrong or right. Exactly how they can improve upon their method? What are they doing that is helping them succeed?

- Give your team members as much time as they need to understand how they can improve their performance in the given area. If you convey impatience or frustration, your team member will not be receptive to absorbing your feedback.

- Limit your feedback to 1-2 items at a time. More than that is overwhelming and can feel like an attack, which will trigger a threat response in their brain and make them less receptive.

- Act in a timely manner. We want to address performance issues as, or soon after, they occur, in order to effectively improve the behavior.

- Address issues as privately as possible. No one likes being corrected in front of guests or teammates. Not only will they not be receptive to your coaching, their embarrassment may result in resentment.

- Be clear regarding expectations and goals.

You should work hand in hand with your GM to determine areas in which your team members have room for improvement. If occasional, verbal coaching is not helping a team member improve, your GM may need to work on a more formal plan through the use of a Coaching Log or Performance Improvement Plan in conjunction with your Regional Manager, the Talent Development Manager, and Human Resources.

It is important to document re-occurring performance issues you notice, such as persistent tardiness, in the Manager’s Log. Sharing and documenting information is important, as you may be unaware that these issues are also occurring on shifts you aren’t working.

Remember, as a Senior Wine Associate, you are not authorized to engage in any formal progressive discipline. All instances in which a team member needs to be corrected through a Verbal or Written Warning need to be referred to your General Manager for implementation. The only exception to this is verbal or physical abuse by a team member towards a guest or another team member. In an instance such as this, where a team member needs to be removed from the store for the safety of themselves or others, you should tell them to leave for the day. If you need assistance, call Airport Security or Police. Immediately contact your General Manager. If you are unable to contact them, contact your Regional Manager. They will provide you with further instructions and handle the matter from there.
TEAM MEMBER BREAKS

When leading your shift, you will need to let team members know when they should take their breaks. The following breaks must be given, as they are required by federal law:

- For every 4 hours worked, a team member must take a 10-minute paid break.
- If a team member is scheduled for at least 5 hours but not more than 6 hours, they may elect to take a 30-minute unpaid meal period in addition to their 10-minute paid break.
- If a team member is scheduled to work 6 or more hours in a particular day, they must take a 30-minute unpaid meal period in addition to their 10-minute paid break.

It is important to note that these breaks cannot be combined, nor taken at the beginning or end of a shift. State law may be more require more frequent breaks or breaks earlier in a shift. Check with your trainer to verify whether your state laws differ from federal law.

The best time for a team member to take a break during shift is at your discretion. This will often require you to plan ahead for the shift, and understand the busiest times in the store when they will be needed most.
HOMEWORK ASSIGNMENTS

Please complete these questions on a separate piece of paper or computer document. This homework assignment is to be submitted to training@vinovolo.com.

1. Pick five interview questions from “The Hire Attitude.” Answer the following for each of the interview questions:
   - Give an example of an answer that would be acceptable. What would that tell you about the person?
   - Give an example of an answer that would be a red flag. What would that tell you about the person?

2. Create three open ended interview questions. What do you hope to learn from each?

3. You and Lance Languedoc are working a fairly slow shift together FOH. It is busy enough that you both need to be there, but not busy enough that either of you is in the weeds. You notice that Lance is frequently stepping into the kitchen, when he isn’t busy delivering food or wine, to chat with Bob Barolo, who is working BOH. Give Lance feedback and coaching on the importance of being in the FOH. Use the exact words you would use as if he was standing right next to you. In addition, explain how you would go about doing so.

4. What are some ways you lead by example in your store?

5. Choose one of the four tips from “How to Hire Without Getting Fooled by First Impressions.” Give an example of an interview question and an answer that applies to that tip.

6. After reading “Recruiting for Cultural Fit,” what are some characteristics you will be looking for in a candidate that would make them a good cultural fit for your team and for the company?

7. What are some intrinsic incentives you can highlight while working to motivate team members?
After completing this worksheet, you should:

- Have knowledge of ADP overview
- Know how to interview possible candidates
- Understand how to coach and motivate team members for superior performance
- Know how to conduct and oversee New Hire training

Once you have finished the training, homework, and discussion questions for all Senior Wine Associate modules, you will be able to schedule a test with your GM during the quarterly open testing period. On the following page you will find a practice quiz on the information contained in this module. The test may include questions on information provided by any of the content in this module, including videos and articles.

If you do not reach the required 80% pass rate on your test, you will be able to retake it during the next quarter’s open testing period. A passing grade on this test is one of the requirements to be considered promotion ready for a Senior Wine Associate position.
# PRACTICE QUESTIONS

The following questions are examples of the type of information that will be required of you on the exam. It should be noted that these particular questions may or may not be asked. You will be expected to show competency over the entire module.

<table>
<thead>
<tr>
<th></th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List three qualities to look for in a candidate.</td>
</tr>
<tr>
<td>2</td>
<td>What are some red flags when interviewing a candidate?</td>
</tr>
<tr>
<td>3</td>
<td>List three places where you may find potential new employees.</td>
</tr>
<tr>
<td>4</td>
<td>According to the Associate Training Checklist, what three things should be completed prior to a new hire’s first day of training?</td>
</tr>
<tr>
<td>5</td>
<td>Who will need to approve a previous applicant or employee before interviewing process begins?</td>
</tr>
<tr>
<td>6</td>
<td>Give an example of an “open-ended” question.</td>
</tr>
<tr>
<td>7</td>
<td>List three questions you can NOT ask in an interview?</td>
</tr>
<tr>
<td>8</td>
<td>What should be checked after interviewing a potential new hire?</td>
</tr>
<tr>
<td>9</td>
<td>Where should you document re-occurring minor issues?</td>
</tr>
<tr>
<td>10</td>
<td>Explain the idea of &quot;lead by example&quot;.</td>
</tr>
</tbody>
</table>
As you move up to Senior Wine Associate your administrative duties get more complex and play a bigger role in your daily routine.

This module will introduce you to the following:

• **COGs Worksheet** - A worksheet that will help everyone on the team identify the top money-making wines to sell.

• **Manage Wine/Flight change (POS, Ctuit, Printed Materials and Merchandising)** – Changing a wine or an entire flight can be a tricky process; there are a lot of steps to be done. It is a task that will require practice and several attempts to master.

• **Tracking and recording (Glass vs. Flight sales, weekly numbers, etc.)** – There are various times when your General Manager, Regional General Manager or someone from corporate will want to track something in the store.

• **Landlord Management** – There are many times you will be the senior person in the store when there is a visit from a landlord. You may also be asked to attend a tenant meeting.

• **Monitor and Report Store Issues** - wear and tear, customer volume and schedule changes, ambient air temperature in the store, store signage and construction, etc. – Part of your role is to report issues to senior management and the corporate office.

• **Monitor Store Safety** – The safety of our team members and our guests is of the utmost importance. There are steps we can take to minimize risk and ensure we are prepared in the event of an emergency.

• **Microsoft Office Tools** – It is important to develop both leadership and administrative skills in order to assist with the successful operations of the store.

• **Store Visit Report Self Assessments** – Your team should be conducting Store Visit Self Assessments on a regular basis. As a SWA, you may be responsible for ensuring this is completed regularly.

• **Store Library** – The checking in and out of books, as well as the condition of those books needs to be monitored.
As we reviewed in Module 1, COGS stands for Costs of Goods Sold and can be measured in both percentage and dollars. Actual COGS can be found using the Summary Variance Report. Actual COGS calculations take shrinkage and growth into account. The COGS worksheet is easier for the team to read and decipher. This should be updated monthly and posted on the bulletin board in the BOH, with the most profitable items highlighted so the team knows which items to focus on.

<table>
<thead>
<tr>
<th>Wine COGS Worksheet - Flight &amp; Glass</th>
<th>Store:</th>
<th>#</th>
<th>Date:</th>
<th>1-Dec-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>GLS Mia Chiara Chianti</td>
<td>SANGI</td>
<td>ITA</td>
<td>9</td>
<td>16.4%</td>
</tr>
<tr>
<td>GLS Saddleworth</td>
<td>SYRAH</td>
<td>AUS</td>
<td>12</td>
<td>15.4%</td>
</tr>
<tr>
<td>GLS Sur Andina Raymi</td>
<td>MALBC</td>
<td>ARG</td>
<td>11</td>
<td>11.0%</td>
</tr>
<tr>
<td>FLT World Value Reds</td>
<td>RREDS</td>
<td>WRD</td>
<td>10</td>
<td>12.6%</td>
</tr>
<tr>
<td>GLS Aurelian</td>
<td>CSAUV</td>
<td>CA</td>
<td>15</td>
<td>17.5%</td>
</tr>
<tr>
<td>GLS Bernal Estate</td>
<td>MERLO</td>
<td>CA</td>
<td>11</td>
<td>9.7%</td>
</tr>
<tr>
<td>GLS Cherry Tart</td>
<td>PNOIR</td>
<td>CA</td>
<td>16</td>
<td>17.1%</td>
</tr>
<tr>
<td>FLT California Kings</td>
<td>RREDS</td>
<td>CA</td>
<td>14</td>
<td>12.1%</td>
</tr>
<tr>
<td>GLS Starment</td>
<td>CHARD</td>
<td>CA</td>
<td>13</td>
<td>16.8%</td>
</tr>
<tr>
<td>GLS Ormszce</td>
<td>OTIRW</td>
<td>FRA</td>
<td>10</td>
<td>17.5%</td>
</tr>
<tr>
<td>GLS Sherwood</td>
<td>SAUV</td>
<td>NZ</td>
<td>11</td>
<td>15.9%</td>
</tr>
<tr>
<td>FLT Shades of White</td>
<td>WHITE</td>
<td>WRD</td>
<td>12</td>
<td>12.9%</td>
</tr>
<tr>
<td>GLS Atlantico</td>
<td>OTHHR</td>
<td>ITA</td>
<td>26</td>
<td>32.0%</td>
</tr>
<tr>
<td>GLS Arrowood</td>
<td>CSAUV</td>
<td>CA</td>
<td>25</td>
<td>31.4%</td>
</tr>
<tr>
<td>FLT Sommelier Series</td>
<td>RREDS</td>
<td>WRD</td>
<td>18</td>
<td>24.5%</td>
</tr>
<tr>
<td>GLS Gramercy Lower East</td>
<td>CSAUV</td>
<td>WA</td>
<td>19</td>
<td>25.3%</td>
</tr>
<tr>
<td>GLS Hoopla</td>
<td>SAUV</td>
<td>NZ</td>
<td>17</td>
<td>20.5%</td>
</tr>
<tr>
<td>GLS Garage Wine Co.</td>
<td>OTHHR</td>
<td>CHL</td>
<td>22</td>
<td>23.1%</td>
</tr>
<tr>
<td>FLT Christmas Cabs</td>
<td>RREDS</td>
<td>NW</td>
<td>20</td>
<td>18.2%</td>
</tr>
<tr>
<td>GLS Robert Oatley GSM</td>
<td>OTHHR</td>
<td>AUS</td>
<td>14</td>
<td>18.7%</td>
</tr>
<tr>
<td>GLS Begali Ripasso</td>
<td>OTHHR</td>
<td>ITA</td>
<td>17</td>
<td>20.5%</td>
</tr>
<tr>
<td>GLS Gordo</td>
<td>OTHHR</td>
<td>SPA</td>
<td>13</td>
<td>17.9%</td>
</tr>
<tr>
<td>FLT The Art Of Blending</td>
<td>RREDS</td>
<td>WRD</td>
<td>16</td>
<td>14.4%</td>
</tr>
<tr>
<td>GLS Chateau Ambe Tour Pourelet</td>
<td>MERLO</td>
<td>FRA</td>
<td>20</td>
<td>25.3%</td>
</tr>
<tr>
<td>GLS Trinitas</td>
<td>MERLO</td>
<td>CA</td>
<td>15</td>
<td>18.9%</td>
</tr>
<tr>
<td>GLS Chateau Carignan</td>
<td>MERLO</td>
<td>FRA</td>
<td>19</td>
<td>24.5%</td>
</tr>
<tr>
<td>FLT Chateau D’Orignac</td>
<td>RREDS</td>
<td>WRD</td>
<td>18</td>
<td>19.0%</td>
</tr>
<tr>
<td>GLS Casa Farvíne Prosecco</td>
<td>SPRKL</td>
<td>ITA</td>
<td>12</td>
<td>17.0%</td>
</tr>
<tr>
<td>GLS Faive-la-Fete</td>
<td>SPRKL</td>
<td>FRA</td>
<td>10</td>
<td>28.7%</td>
</tr>
<tr>
<td>GLS Costeller Brut Cava</td>
<td>SPRKL</td>
<td>SPA</td>
<td>11</td>
<td>17.2%</td>
</tr>
<tr>
<td>FLT Celebration Sparklers</td>
<td>SPRKL</td>
<td>WRD</td>
<td>18</td>
<td>10.3%</td>
</tr>
<tr>
<td>GLS Actea</td>
<td>OTHHR</td>
<td>SPA</td>
<td>8</td>
<td>16.0%</td>
</tr>
<tr>
<td>GLS Pascolo</td>
<td>PGRIC</td>
<td>ITA</td>
<td>8</td>
<td>18.6%</td>
</tr>
<tr>
<td>GLS Zonin Prosecco Splits</td>
<td>SPRKL</td>
<td>ITA</td>
<td>8</td>
<td>8.2%</td>
</tr>
<tr>
<td>GLS Justino’s Madeira</td>
<td>DSERT</td>
<td>PIR</td>
<td>9</td>
<td>31.9%</td>
</tr>
<tr>
<td>GLS Chateau D’Orignac</td>
<td>DSERT</td>
<td>FRA</td>
<td>8</td>
<td>51.2%</td>
</tr>
<tr>
<td>GLS Moët &amp; Chandon Splits</td>
<td>CHAMP</td>
<td>FRA</td>
<td>18</td>
<td>13.9%</td>
</tr>
<tr>
<td>GLS Bowmore Harbor</td>
<td>RIESL</td>
<td>MI</td>
<td>9</td>
<td>21.8%</td>
</tr>
</tbody>
</table>
GIVE IT A TRY

At the beginning of the month, update a COGS worksheet with your trainer. Highlight the items with the best COGS and margins, and post in the BOH. Upload the COGS worksheet and matching wine menu to the Wine Resources Site.

COGS WORKSHEET CONTINUED

The worksheet should be filled out as follows:

NAME: Name of the producer and the wine (if there is room)

VARIETY: Use the drop-down box to select a variety

REGION: Use the drop-down box to select a region

BTL COST: The amount that the bottle cost the store

BTL PRICE: The amount the store is charging for it

DATE ON: The date each item went on the menu. This helps to judge, at a glance, how long an item has been in the store and if it is time to switch it out for something new.

NAT’L ALOC: Amount of a National Wine allocated to your store or market

NAT’L PURCH: Amount of a National Wine purchased. This helps track how much more wine you need to buy to meet the commitment.

The COGS worksheet and the matching wine menu need to be uploaded to the Wine Resources Site at the beginning of every month. Including it in your store’s inventory checklist is a good way to ensure it is not forgotten. Follow the steps to upload:

1. Access the Wine Resources Site: https://sites.google.com/a/vinovolo.com/wine/
2. Select the COGS & Menus tab at the top of the page
3. Click on “View All” and select your location
4. Select “+ Add File” and upload from your computer

Be sure the file is titled “Airport Code store # COGS” and “Airport Code store # Menu Taste”. For example: PHL 6 COGS or PHL 6 Menu Taste. It should be titled the same way every time in order to write over the previous month’s files.

GIVE IT A TRY

At the beginning of the month, update a COGS worksheet with your trainer. Highlight the items with the best COGS and margins, and post in the BOH. Upload the COGS worksheet and matching wine menu to the Wine Resources Site.
As you know, we rotate out discovery wines regularly, as well as wines on our core list roughly every six months. This means that you will often be responsible for updating the menu when wines are added. You will need to perform various tasks to make sure all store systems and material are synchronized.

**ADDING NEW WINES**

The following is a checklist of items you will need to perform:

1. **Ctuit**
   - I. Check to see if the wine has already been created in the Ctuit inventory system.
   - II. If wine is not present in Ctuit, it will need to be created in Ctuit. Refer to the Ctuit User Guide for instructions on how to do this.

2. **Squirrel and POS**
   - I. Add the bottle, glass, taste and flight to the POS system (if new).
   - II. Change the buttons on the POS system to reflect the list the day of or night before the items go live.

3. **Printing Materials**
   - I. Print Menus.
   - II. Print Tasting Sheets.
   - III. Ensure Talking Points are printed and/or up to date.
   - IV. Take discontinued flights out of the display niches and replace them with new ones that you are rolling out.

4. **Inform the team of the change and talk about the new wine offering**
   - The team should already be familiar with the wine from the sourcing tastings, writing the tasting notes, and drafting the talking points.

**Operations Manual:** Information on how to add wines to the POS system should be available in the Operations Manual.
ADDING NEW PRODUCTS

Products set up incorrectly in Squirrel or Ctuit are a major contributor to issues with inventory. It is important that all products are set up in an organized manner and that details aren’t missed.

ADDING NEW PRODUCTS - SQUIRREL

On the Squirrel Explorer BOH computer, select “Daily Setup” on the right-hand tool bar. Select “Menu Entry Setup”. This will bring you to the screen on the following page.
*Examples are for Wine Only. However, the same procedure can be used to create Food and Merchandise Buttons.*

• In the center, navigate the folders to find a similar item to the one you’re creating (i.e. to create ‘BTL Bigaro’, select another ‘BTL’). [Sales -> Wine -> ‘On Premise’ or ‘Bottles’; ‘On Premise’ -> ‘Flights’, ‘Glasses’, or ‘Tasters’].

• Select the similar item and click ‘New Record’ (button with *). This is crucial. If you don’t select New Record, you write over an existing Button and your recipes will be incorrect.

• Name the button using the Ctuit naming guidelines:
  - Found on the next page and in your SSOP.

• Enter a price:
  - Double-click ‘0.00’ under the heading ‘Amount’.
  - Enter the desired price. [TSTs should be 1/3 of the GLS price, rounded to the nearest $0.05].

• Click ‘Save Record’ (button with blue bubble and pencil).

• Repeat for all new buttons.
  - [For new flights, you will create 10 new buttons].
Standard Naming Conventions | Wine

<table>
<thead>
<tr>
<th>Size</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>750 ML</td>
<td>750</td>
</tr>
<tr>
<td>375 ML</td>
<td>375</td>
</tr>
<tr>
<td>3 L</td>
<td>3L</td>
</tr>
<tr>
<td>1.5 L</td>
<td>1.5L</td>
</tr>
<tr>
<td>Glass</td>
<td>GLS</td>
</tr>
<tr>
<td>Taste</td>
<td>TST</td>
</tr>
<tr>
<td>Flight</td>
<td>FLT</td>
</tr>
</tbody>
</table>

Please note that we are no longer using 3 L for bottles. For flights, we will only be using the flight name followed by the store number. No more dates, no more grape categories.

Example: FLT-WORLD VALUEFCGS-31

SIZE-GRAPe-WINERY-WINE NAME-ORIGIN
For very long names, please adhere to the following character limits:
- Winery | 10 Chars
- Wine Name | 6 Chars
- Origin | 2 Chars

Additionally, please abbreviate full words like Domaine, Carrière, and Bodegas to their first letter. Use Ch for Chateau.

<table>
<thead>
<tr>
<th>Grape Name</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabernet Sauvignon</td>
<td>CSSV</td>
</tr>
<tr>
<td>Cabernet Franc</td>
<td>CABF</td>
</tr>
<tr>
<td>Malbec</td>
<td>MBLC</td>
</tr>
<tr>
<td>Merlot</td>
<td>MERL</td>
</tr>
<tr>
<td>Pinot Noir</td>
<td>PNOR</td>
</tr>
<tr>
<td>Syrah/Shiraz</td>
<td>SYRA</td>
</tr>
<tr>
<td>Tempranillo</td>
<td>TEMP</td>
</tr>
<tr>
<td>Zinfandel</td>
<td>ZINF</td>
</tr>
<tr>
<td>Italian Red Varietal</td>
<td>ITAL</td>
</tr>
<tr>
<td>Other Red</td>
<td>ORHR</td>
</tr>
<tr>
<td>Bordeaux Blend</td>
<td>BORD</td>
</tr>
<tr>
<td>Other Red Blend</td>
<td>BLNDR</td>
</tr>
<tr>
<td>Chardonnay</td>
<td>CHRD</td>
</tr>
<tr>
<td>Gewurtztraminer</td>
<td>GWRZ</td>
</tr>
<tr>
<td>Pinot Grig/Pinot Gris</td>
<td>PRGPG</td>
</tr>
<tr>
<td>Riesling</td>
<td>RIES</td>
</tr>
<tr>
<td>Sauvignon Blanc</td>
<td>SAVBL</td>
</tr>
<tr>
<td>Viognier</td>
<td>VIOGN</td>
</tr>
<tr>
<td>Rosé</td>
<td>ROSE</td>
</tr>
<tr>
<td>Sparkling</td>
<td>SPRKL</td>
</tr>
<tr>
<td>Other White</td>
<td>OTHRW</td>
</tr>
<tr>
<td>White Blend</td>
<td>BLNWD</td>
</tr>
<tr>
<td>Dessert Wine</td>
<td>DESRT</td>
</tr>
</tbody>
</table>

Please note that we have switched to two-character region codes. For US wines, just use the state abbreviation.

<table>
<thead>
<tr>
<th>Origin</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Argentina</td>
<td>AR</td>
</tr>
<tr>
<td>Austria</td>
<td>AT</td>
</tr>
<tr>
<td>Canada</td>
<td>CD</td>
</tr>
<tr>
<td>Chile</td>
<td>CL</td>
</tr>
<tr>
<td>France</td>
<td>FR</td>
</tr>
<tr>
<td>Germany</td>
<td>GD</td>
</tr>
<tr>
<td>Italy</td>
<td>IT</td>
</tr>
<tr>
<td>New Zealand</td>
<td>NZ</td>
</tr>
<tr>
<td>Portugal</td>
<td>PT</td>
</tr>
<tr>
<td>South Africa</td>
<td>SA</td>
</tr>
<tr>
<td>Spain</td>
<td>SP</td>
</tr>
<tr>
<td>Other Country</td>
<td>XX</td>
</tr>
</tbody>
</table>

All beer will be coded in the following format:
BEER: ALE-BREWERY NAME-BEER NAME
BEER: LAGER-BREWERY NAME-BEER NAME

NATIONAL DEAL WINES
ITAL-FATTORIA 1-MIA CH-IT
MALT-RAVINI-AR
MERLO-WENTE FAMI-BERNAL-CA
SAUV-WENTE FAMI-CRANE-CA
SAVBL-SHANNON RI-HIGH V-CA
BLNWD-WILLAMETTE-UNVEIL-OR
CHARD-TANLEY OA-NAPA V-CA
CSAV-DUCKHORN-NAPA V-CA
TEMPR-TESO LA MO-VICTOR-ES
PGRG-TERR DEGL-PASCAL-IT
ROSE-ONTANON-PERSEP-ES

* In the event that there is no additional wine name, you will just use a double hyphen as we have done in the example for Raymi Malbec.

MALBC-RAYMI--AR
ADDING NEW PRODUCTS – SQUIRREL CONTINUED

Once a product has been set up in Squirrel, you need to create buttons for use on the FOH POS.

On the Squirrel Explorer BOH computer, select “Daily Setup” on the right-hand tool bar. Select “Point of Sale Screen Setup”.

Navigate screens as you would the POS touch screens.
- Left click to select buttons or enter screens. Right click to position buttons.
- For New Flight Screen, double-click a blank space in the main directory. [A ‘Screen’ is a window in which to place buttons. A ‘Menu’ is a button that is linked to a sellable product.]
- Select ‘Screen’ in the top-middle of the pop-up.
- For ‘Reference Name’, select <New Screen>.
- For ‘P.O.S. Name’, type desired screen name. (For flights, this is the flight name.).
- Select size and color of the button and click ‘OK’.
- Back in the main Directory, you should see your new screen! Left click to enter and build your flight.
- Again, double click a blank space, but this time select ‘Menu’ from the pop-up window.
- Open folders on the left side of the window to locate the buttons you previously created in ‘Menu Entry Setup’.
- Click the button names and then the ‘check mark’ at the top of the list to select. You may select all the buttons you need at one time before clicking ‘OK’.
### ADDING NEW PRODUCTS – SQUIRREL CONTINUED

- Right click and drag to position your buttons:

<table>
<thead>
<tr>
<th>Flight</th>
<th>BTL WINE 1</th>
<th>GLS WINE 1</th>
<th>TST WINE 1</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>BTL WINE 2</td>
<td>GLS WINE 2</td>
<td>TST WINE 2</td>
</tr>
<tr>
<td></td>
<td>BTL WINE 3</td>
<td>GLS WINE 3</td>
<td>TST WINE 3</td>
</tr>
</tbody>
</table>

- [To **CUT** and **PASTE**, right click on the button without moving it and select ‘cut’. Navigate to the desired Screen, right-click on an empty space and select ‘paste’. Multiple wines can be moved by holding ‘Control’ on the keyboard.]
- You can cut/paste SM and LRG Food and ‘no make’ buttons, from another flight screen.
- Wines from old flights should be cut/pasted to ‘Wine of the Day’ or ‘Retail Bottles’ as applicable.
- [To **DELETE** buttons, you can ‘cut’ them without pasting, or simply drag them off the screen.]
- Exit POS Screen Setup by clicking the red ‘Home’ key and answering ‘Yes’ to both pop-up questions.
- Buttons will be activated the next time you start POS or ‘Send Setup Changes to Terminals’ under ‘Point of Sale Control’.

---

**GIVE IT A TRY**

Practice creating buttons on the POS with your trainer.
FORMATTING THE WINE MENU

After adding the wines to the POS and Ctuit systems, you will need to print the appropriate updated materials.

As you may be aware by now, there is a certain format we follow for presenting wines on our wine menu, the following is a guide for when you need to update the menus.

**Line 1:** Varietal (blends listed as dominant varietal – Grenache Blend), Producer Name

**Line 2:** Country/Region, Sub-Region, Vineyard/ Wine Name, Vintage

**Using the template:** Note that all the information on line 2 must fit on a single line – the template will not allow you to use a second line as it will not fit on the menu.

---

**World Value Reds**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dolcetto Marchesi di Barolo</td>
<td>9</td>
</tr>
<tr>
<td>Italy, Piedmont, Serral, 2015</td>
<td></td>
</tr>
<tr>
<td>Malbec Château Lagrézette</td>
<td>12</td>
</tr>
<tr>
<td>France, Cahors, Seigneur de Lagrézette, 2015</td>
<td></td>
</tr>
<tr>
<td>Shiraz Saddlenorth Hills</td>
<td>11</td>
</tr>
<tr>
<td>Australia, Clare Valley, Reserve, 2013</td>
<td></td>
</tr>
</tbody>
</table>

**Taste all three**

**Blockbuster Reds**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabernet Sauvignon Fortnight</td>
<td>16</td>
</tr>
<tr>
<td>California, Napa Valley, 2014</td>
<td></td>
</tr>
<tr>
<td>Tempranillo La Mejorada</td>
<td>14</td>
</tr>
<tr>
<td>Spain, Castilla Y Leon, Villalar Oro, 2009</td>
<td></td>
</tr>
<tr>
<td>Nebbiolo Tenuta Olim Bauda</td>
<td>18</td>
</tr>
<tr>
<td>Italy, Piedmont, San Pietro, 2011</td>
<td></td>
</tr>
</tbody>
</table>

**California Kings**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabernet Sauvignon Aurelian</td>
<td>15</td>
</tr>
<tr>
<td>California, Red Hills Lake County, 2014</td>
<td></td>
</tr>
<tr>
<td>Merlot Bernal Estates</td>
<td>11</td>
</tr>
<tr>
<td>California, Central Coast, 2014</td>
<td></td>
</tr>
<tr>
<td>Pinot Noir Cherry Tart</td>
<td>16</td>
</tr>
<tr>
<td>California, Monterey/Santa Barbara, Barrel Select, 2014</td>
<td></td>
</tr>
</tbody>
</table>

**Taste all three**

**Spring Bouquet**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chenin Blanc Husch Vineyards</td>
<td>11</td>
</tr>
<tr>
<td>California, Mendocino, 2015</td>
<td></td>
</tr>
<tr>
<td>Roussanne Domaine Les Cantales</td>
<td>17</td>
</tr>
<tr>
<td>France, Savoie, 2013</td>
<td></td>
</tr>
<tr>
<td>Furmint Affinitas</td>
<td>12</td>
</tr>
<tr>
<td>Hungary, Tokaj, 2012</td>
<td></td>
</tr>
</tbody>
</table>

**Tour de France**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pinot Noir Chateau de Chamilly</td>
<td>15</td>
</tr>
<tr>
<td>France, Bourgogne, Cotes Chalonnaise, 2013</td>
<td></td>
</tr>
<tr>
<td>Grenache Blend Domaine les Queretades</td>
<td>13</td>
</tr>
<tr>
<td>France, Rhone Valley, Uva, 2010</td>
<td></td>
</tr>
<tr>
<td>Merlot Blend Chateau Perene</td>
<td>16</td>
</tr>
<tr>
<td>France, Bordeaux, Cru Bourgeois, 2012</td>
<td></td>
</tr>
</tbody>
</table>

**Taste all three**

**Shades of White**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chardonnay Starmont</td>
<td>13</td>
</tr>
<tr>
<td>California, Carneros, Stanley’s Curve, 2012</td>
<td></td>
</tr>
<tr>
<td>Sauvignon Blanc Sherwood</td>
<td>11</td>
</tr>
<tr>
<td>New Zealand, Marlborough, Stone Range, 2015</td>
<td></td>
</tr>
<tr>
<td>Picpoul Les Vigneron de Floransac</td>
<td>12</td>
</tr>
<tr>
<td>France, Languedoc, Picpoul de Pinet, Omezon, 2015</td>
<td></td>
</tr>
</tbody>
</table>

**Taste all three**

**Sommelier Series**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corvina Blend Marchesi Fumanelli</td>
<td>28</td>
</tr>
<tr>
<td>Italy, Veneto, Amarone della Valpolicella Classico, 2009</td>
<td></td>
</tr>
<tr>
<td>Cabernet Sauvignon Blend Arrowood</td>
<td>25</td>
</tr>
<tr>
<td>California, Sonoma, Proprietary Red, 2013</td>
<td></td>
</tr>
</tbody>
</table>

**Taste both**

**Signature Red**

<table>
<thead>
<tr>
<th>Wine Name</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monastrell Actea, Spain, 2013</td>
<td>8</td>
</tr>
<tr>
<td>Pinot Grigio Pascolo, Italy, 2015</td>
<td>8</td>
</tr>
</tbody>
</table>

---

**GIVE IT A TRY**

Update the menu for the next wine change with your trainer.
TRACKING

There are many instances when we want to track an item, a series of items or a trend. Both Squirrel and Ctuit can be very helpful. As you become more familiar with the tools and reports at your disposal you will find a plethora of ideas to focus sales and profitability. Some directives may come from corporate, your Regional Manager, your General Manager, or they could be generated from within the team. It is always a good idea to post or distribute the results so the team can follow progress and/or identify a target.

<table>
<thead>
<tr>
<th>Date</th>
<th>Number of Flights Sold</th>
<th>Number of Glasses Sold</th>
<th>Total</th>
<th>% Flights</th>
<th>% Glasses</th>
</tr>
</thead>
<tbody>
<tr>
<td>28-Jun</td>
<td>91</td>
<td>330</td>
<td>421</td>
<td>21.62%</td>
<td>78.38%</td>
</tr>
<tr>
<td>5-Jul</td>
<td>121</td>
<td>309</td>
<td>430</td>
<td>28.14%</td>
<td>71.86%</td>
</tr>
<tr>
<td>12-Jul</td>
<td>154</td>
<td>299</td>
<td>453</td>
<td>34.00%</td>
<td>66.00%</td>
</tr>
<tr>
<td>19-Jul</td>
<td>176</td>
<td>301</td>
<td>477</td>
<td>36.90%</td>
<td>63.10%</td>
</tr>
<tr>
<td>26-Jul</td>
<td>210</td>
<td>292</td>
<td>502</td>
<td>41.83%</td>
<td>58.17%</td>
</tr>
</tbody>
</table>

The above is an example of focusing your team to suggestively sell flights. With some serious effort, over time, you could create a win-win scenario; the guest has a better “Discovery” experience and we improve sales and profitability. Flights are the most profitable way we sell wine and they lead to more wine conversations which in turn lead to up-sold glasses and increased retail wine sales.
**MENU WINNERS**

Food is a profit center as well. As is true with any list, there are your top performers and your weaker performers. This is a great example of how one store created a way for the team to identify high profit food items and high profit add-on sales. Posted in the back as a reference guide for the team, this could be a very helpful and profitable suggestive selling instrument.

---

**A Tale of Two Seatings**

<table>
<thead>
<tr>
<th>They call me Big Papa!</th>
<th>Easy Street</th>
</tr>
</thead>
<tbody>
<tr>
<td>these items have our best margin</td>
<td>easy sales add up to hard currency</td>
</tr>
<tr>
<td>MEATS</td>
<td>$11.00</td>
</tr>
<tr>
<td>SALMON, REG</td>
<td>$10.50</td>
</tr>
<tr>
<td>CHILI</td>
<td>$10.00</td>
</tr>
<tr>
<td>CHICKEN SALAD</td>
<td>$8.50</td>
</tr>
<tr>
<td>PENNE</td>
<td>$8.50</td>
</tr>
<tr>
<td>BRIE SANDWICH</td>
<td>$7.50</td>
</tr>
</tbody>
</table>

**Don't get me started!**

should not be your 1st recommendation

| TACOS | $6.75 |
| CHICKEN SANDWICH, | $6.50 |
| SALMON, SML | $6.00 |

---

These items and their margins have no relation to your store’s current margins. This chart is only for demonstrative purposes.
MERCHANDISE

Merchandise has not historically been a large revenue generator. Stores choosing to sell merchandise may select from Vino Volo branded Cocoa Dolce chocolate bars, Vino Volo single bottle wood boxes, GoVino glasses, Haley’s corks, and TSA approved corkscrews. If there is an item you would like to test in your stores, you should email Alice Wu, our Director of Marketing, with your GM’s approval.

THE BARREL

The Barrel is Vino Volo’s online warehouse and virtual marketplace for marketing and branded materials. This is where you can order retail packaging, like single bottle bags or 3 pack carriers, as well as products like menu clipboards, “Please Be Seated” signs, And 3-circle tasting notes.

For instructions on accessing and ordering from The Barrel, visit our Marketing Resources site at:

https://sites.google.com/a/vinovolo.com/marketing-resources/home

Or by browsing the Vino Volo Sites in your Google Apps.

BANKING

You will periodically need to order deposit slips and deposit bags from your local bank. Information for these should be in the Ordering Guide of your SSOP. Contacts and procedures for placing these orders are determined by which bank your store uses.
ORDERING GUIDES

Ordering guides contain much valuable information if used properly. They can be useful tools in tracking your order history, average product usage, and assist in adjusting pars. They should contain all the useful information necessary for completing and placing an order; contact name and phone number for sales representative (customer service and sales manager numbers are also useful in case there is a problem), order and delivery days and times, list of items to order (with product codes if possible) and par level or “build to” quantities. Creating an order guide can be a simple process using an Excel spreadsheet. Create a file name and start a workbook; each vendor (or wine distributor if creating a wine order guide) would be represented with a tab at the bottom of the workbook. Set up columns for the product, vintage, price, and dates with “on hand” and “order” quantities. All other pertinent information can be kept on the top or bottom of the page. Creating an order guide for other supplies is just as simple; follow the same process but replace the tabs at the bottom of the workbook with vendors such as Staples or US Foods.

SUPPLY ORDERING GUIDE

<table>
<thead>
<tr>
<th>Item</th>
<th>Item Number</th>
<th>Pack</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thermal Paper Roll</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plain Paper Roll</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Color Printer Ribbon</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adams-Burch</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact: David Walker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>301-276-2074</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cell 727-4471</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(For Supplies / BSH Supplies / Chemicals / Light Bulbs, Paper Rolls)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

WINE ORDERING GUIDE

<table>
<thead>
<tr>
<th>Wine</th>
<th>Vintage</th>
<th>Case Size</th>
<th>Cost (c/b)</th>
<th>INV</th>
<th>Order</th>
<th>INV</th>
<th>Order</th>
<th>INV</th>
<th>Order</th>
<th>INV</th>
<th>Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aloxe Cab</td>
<td>2001</td>
<td>12</td>
<td>251.99/20.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ravenswood Zin, Tedeschi</td>
<td>2002</td>
<td>12</td>
<td>239.98/19.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caymus Cab Special Select</td>
<td>2002</td>
<td>6</td>
<td>583.98/37.33</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Willametteberg Chard</td>
<td>2003</td>
<td>12</td>
<td>107.88/8.96</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barboursville Barbera (Res)</td>
<td>2003</td>
<td>12</td>
<td>167.88/15.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ch St Michelle De Loosen</td>
<td>2004</td>
<td>6</td>
<td>598.25</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Alison Christ Sales Rep. 571</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Jim Futrell Manager 571</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Chris Galla Manager 703</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>269-269-269</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>571-233 0239</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Dist</td>
<td>Country Wines</td>
<td>Virginia Imports</td>
<td>Harry Wine Group</td>
<td>Select</td>
<td>Service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These guides can be kept on the store laptop and should be accessible to anyone that needs to place orders. They can also be great tools for adjusting orders and controlling spending and inventory levels as long as pars are updated seasonally (or as needed when business patterns shift) and accurate “on hand” counts are taken. They can show you when there is a problem; if business is at the same level but you go through twice as much product as the previous period, there could be a waste issue at hand. For example, let’s say over the course of a month your dish machine chemicals double but sales volume has been relatively the same; you could have a malfunction in machine itself, there could be a leak or the team could be running the machine unnecessarily (1/2 full or twice because dishes are not coming clean, etc). In any case, it is costing you money and affecting your P&L; the order guide would alert you to make a service call or direct your attention to a training issue.

It could also show you that a procedure is not being followed if a particular product usage drops significantly over a time period. Or it could help identify seasonal trends and help you make adjustments in other areas as well.
LANDLORD MANAGEMENT

As a Senior Wine Associate, you will begin interacting on a more regular basis with our landlords as a representative of Vino Volo. Our relationships with our landlords can be very delicate and complicated, so it is important that you always treat them with respect and respond to their requests in a timely manner. These relationships are managed by our Senior Wine Associates, General Managers, the Operations team, and the Development team.

A healthy partnership can go a long way toward making daily operations smoother. Some of our landlords, such as Airmall, Westfield, and Marketplace contract with numerous airports to manage their concession programs. This means that our relationship and reputation in one airport can affect our other airport locations, and even determine whether we are able to open new locations.

You may be asked to attend a tenant meeting. While you are in attendance you should:

- Consider yourself a representative of the company as a whole
- Be professionally dressed (either your Vino Volo uniform or business casual)
- Be prepared: paper, pen, GM business cards
- Ensure your phone is either turned off or on silent.
- Pay attention. Do not email or text with your phone or have a conversation with the person next to you while a presentation is taking place.
- Take detailed notes to present to your GM

If a landlord has a request for information, you should always notify your GM. Do not give out details regarding our operations, financials, or NSO plans without GM approval.

If a landlord visits the store, and you are the senior team member present:

- Notify your GM immediately
- Be courteous, welcoming, and helpful
- Do not leave them alone in the store
- Make notes regarding the interaction
- Notify your GM once they have left. If it was a casual or routine visit, an email will suffice. If it was something more serious, call your GM. If your GM is not available, contact your Regional Manager.

SHIPPING

We have an account set up with UPS, and we use their online shipping center to process all of our shipments. Check with your GM for login and password information. The majority of our communication is now done electronically, but we still ship monthly mail packs to the Corporate Office, and occasionally will need to make other shipments as well.

GIVE IT A TRY

The link below will take you to a tutorial on the UPS website, which will explain the process for setting up a shipment. [http://www.ups.com/shippingdemo/](http://www.ups.com/shippingdemo/)
You must ensure that all equipment in the store is properly maintained. Each store will have different requirements. Make sure you know the details for your store.

REPAIRS & MAINTENANCE BINDER

Your store should have an R&M binder that contains all equipment owners’ manuals, warranties and other information about the store’s equipment and finishes. It should also have numbers to call to get service on any particular piece of equipment. You should keep records of any repairs, inspections or maintenance that have been performed on equipment there. Make sure you keep this binder in a safe, yet easily accessible place.

MONTHLY MAINTENANCE

We do not have preventative maintenance contracts set up for the stores, unless this is arranged by your airport, so it is important that you keep your equipment in top working order by checking it once a month and performing a little preventative maintenance yourself. This should be a part of your “End of the Month Checklist” and done when you take inventory. Here are some examples:

- **Refrigeration equipment**- wipe/dust condenser coil and clean door seals. Make sure unit is maintaining proper temperature.
- **Dish Machines**- should be de-limed (done bi-monthly if you have hard water problems).
- **Fire Extinguishers**- should be maintained and charged every 6 months; check dates monthly and schedule as needed.
- **Grease Trap**- Should be scheduled with an outside vendor (in many cases this is set up by the airport or they have a recommended company that is badged to work in the airport).
- **Pest Control**- Monthly service is often required as part of our lease and should be scheduled with an outside vendor (in many cases this is set up by the airport or they have a recommended company that is badged to work in the airport).
- **Plumbing, Electrical and Minor Maintenance**- often the landlord can recommend companies that currently do work in their buildings; contact your Tenant Coordinator for contact information.
- **Light Bulbs**- It’s a good idea to keep a good supply of all light bulbs used in the store. Burnt out bulbs need to be replaced immediately.

**Check Your Warranty:** We often purchase extended warranty protection for key pieces of equipment. Make sure you check your warranty in the R&M Binder before making a service call.

Get small problems repaired before they become big problems; that little noise, if not normal, is definitely a problem waiting to happen.
You must make sure that the store is a safe environment for both customers and your team, and that all team members know what to do should an accident or emergency occur. Airports have guidelines for what to do in emergency situations, such as tornados or fires. You should be aware of these guidelines, and if possible, keep them posted in your BOH.

**EMERGENCY NUMBERS**

You should have emergency numbers posted by the phone. This should include the fire department, police, paramedics, and any other relevant numbers.

You should also know the location of the nearest emergency medical center. This should be located on the front page of the Operations Manual and should be posted in the back of house.

**FIRST AID KITS**

You should establish a regular schedule for checking the first aid kit to ensure that it is fully stocked. Replace missing items or items that have expired. Supplies can be ordered through your store supply or office supply vendor.

**SAFETY SELF-INSPECTIONS**

Once per quarter, you should perform a safety self-inspection. It’s easy to let certain safety standards slide over time and this is a good way to check yourself before the health inspector does. A complete guide and checklist should be provided in the Operations Manual.
It is good practice to do a store wide self-inspection on a quarterly basis. Below is a comprehensive checklist.

### SELF-INSPECTION CHECKLIST
(Complete quarterly & keep in safety file for 1 year)

**Date:** ____________________________

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are required State &amp; Federal posters properly displayed?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Is there a Material Safety Data Sheet (MSDS) available on each cleaning product easily accessible to where product is stored?</td>
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<td>☐</td>
<td>☐</td>
<td>Are all containers labeled as to their contents?</td>
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<tr>
<td>☐</td>
<td>☐</td>
<td>Are cleaning products kept away from food?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are cleaning products kept in closed containers when not in use?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are protective gloves provided and used to prevent rashes from cleaning products?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Do team members know what to do in case of an emergency?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are first aid kits accessible with necessary supplies kept stocked, periodically inspected and replenished?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are all spilled materials or liquids cleaned up immediately?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are aisles and floors kept clear?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Is all equipment kept clean, properly maintained and inspected on a regular basis?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Is a list of Worker’s Comp approved treatment centers and “What to Do in Case of Injury” posted?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are all wiring, cords, and cables free of splices, tape, fray or deterioration?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Is sufficient clearance provided around and between equipment to allow for safe operation, set-up, servicing, and waste removal?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are all stepladders maintained in good condition?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are all exits kept free of obstruction?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are copies of the Customer &amp; Property Incident Report and Accident Injury Investigation Report printed and readily accessible to the team in case of an accident within the store?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are doors that swing in both directions provided with viewing panels?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are fire extinguishers mounted in a readily accessible area?</td>
</tr>
<tr>
<td>☐</td>
<td>☐</td>
<td>Are documentation of safety meetings, hazard assessments, inventory of hazardous materials maintained?</td>
</tr>
</tbody>
</table>
**REPORTING INJURIES**

In the event of an injury to a team member or guest, an incident report must always be filled out. Be sure copies are always printed and accessible to the team. Electronic copies are available on the HR Resources Site: [https://sites.google.com/a/vinovolo.com/vino-volo-hr/home](https://sites.google.com/a/vinovolo.com/vino-volo-hr/home) under the Worker’s Compensation/Safety tab. A copy of each type of incident report should be in the SSOP and an electronic version should be saved on the store’s laptop.

Injured employees must go to a worker’s compensation insurance approved facilities, otherwise they might not cover the cost. A list of facilities should always be posted, along with the “What to Do in Case of Injury” sheet. Both of these documents can be found in the Worker’s Compensation/Safety section of the Human Resources Site.

**MICROSOFT OFFICE**

In the restaurant industry, we all come from different backgrounds with different levels of technology training. Whatever your background, you are pursuing a course of training that will prepare you to assist with running a restaurant. In today’s restaurant world, especially in a large, modern company like Vino Volo, knowing how to utilize programs like Microsoft Word and Microsoft Excel are crucial to your duties as a SWA.

View the Excel tutorial on the right by accessing the Training Resources Site. Select the Videos tab and scroll down to the Senior Wine Associate videos. If you are familiar with Excel, you may not need to watch this video. However, you will be asked to utilize Excel to complete the homework, so feel free to refer to the video at any time.

View the Word tutorial on the right by accessing the Training Resources Site. Select the Videos tab and scroll down to the Senior Wine Associate videos. If you are familiar with Word, you may not need to watch this video.
SVR SELF ASSESSMENTS CONTINUED

By now, you should be very familiar with completing SVR Self Assessments and using them to monitor the store and prepare the team. As a SWA, your GM may delegate the task of assigning these SVRs to team members on a regular basis and ensuring they are completed. It may help to make a chart using Excel in order to track how often these are being completed and by whom. All members of the team should be taking a turn with this task in order to better understand store standards and operations.

The chart below is a basic example of an easy way to track SVR completion.

<table>
<thead>
<tr>
<th></th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
</tr>
</thead>
<tbody>
<tr>
<td>Susy Sangiovese</td>
<td>x</td>
<td>x</td>
<td></td>
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<td>x</td>
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</tr>
<tr>
<td>Bob Barolo</td>
<td>x</td>
<td></td>
<td>x</td>
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<td></td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Lucy Loire</td>
<td></td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Mike Margaux</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

MICROSOFT TOOLS

When you become a SWA, an @vinovolo.com Outlook account will be created for you. You will be able to access apps such as OneDrive, Skype, Calendar, Teams, and SharePoint. The proper use of apps, to which you have access through this account, are an important part of being a productive, efficient SWA.

The most used app will be your Outlook account. It is important that you check this account every day for important information relating to your store and your team. You are responsible for being aware of, and responding to, the communications you receive via this account. All emails relating to official Vino Volo business should be sent and received using this account; never your personal email. You will use this account to communicate with your team, your General Manager, your Regional Manager, the Support Center, vendors, suppliers, airport officials, and others.
MICROSOFT TOOL CONTINUED

Your Outlook Calendar is an important tool for keeping the many tasks of an SWA organized. You can input recurring monthly events such as inventory, weekly tasks such as placing wine orders, and quarterly tasks such as Street Pricing. If your GM already has store admin events scheduled into their calendar, they may share these events with you so that you are both aware of any tasks that need to be completed. Your GM or RM may also create and send you deadline reminders, such as a P&L analysis being due to the RM on a specific date. You may receive webinar invites that, once accepted, will appear on your calendar.

Skype is an app that allows you to make video calls over the internet. This can be more effective than audio conference calls. As we discussed in the Wine Associate manual, active listening requires you to not only listen to what is being said, but to watch facial expressions and body language to more fully understand the speaker’s intent. In addition, with a company that is spread across the US and Canada, it is helpful to put a face with a name.

OneDrive is an app that stores files on the internet and allows you to synchronize documents across devices, as well as share with other users, who can either view or edit your documents. This app allows you to access and edit documents from anywhere and any device, as long as you have internet access and an @vinovolo.com email (for access to internal Vino Volo documents). This is an ideal tool for creating and sharing documents that may contain sensitive information, such as a manager log, that you do not want to store on the store laptop. This also enables you to jointly edit documents without needing to attach it to an email and reduces the amount of document versions that can easily be confused.

STORE LIBRARY

Your store library is an important part of the Training Program. It reduces the costs of training to the store, as well as the costs of learning to the team. It is important that these shared books are properly stored, maintained, and tracked in the Store Library sheet so that the team can get the most out of them.

Policies and information regarding the operation of the store library can be found by accessing the Training Resources Site, selecting the Training Documents tab, and reading the “Store Library” section of the Training Policies and Tools document. Review this section of the document thoroughly. As the SWA, your GM may delegate the task of Librarian to you.
HOMEWORK ASSIGNMENTS

Please complete questions 1 and 3 in a Microsoft Word document. This homework assignment is to be completed by attaching this Word Document to an email and submitting to training@vinovolo.com.

1. Use the motivational skills discussed in the previous module, and the tracking skills learned in this module to plan and implement a team contest over the next month.
   - What is the goal of the contest?
   - What are the rules and/or parameters?
   - How does the goal affect sales or profitability?
   - How did you track team progress?
   - What did you do to motivate the team to meet the goals?
   - What was the outcome?

2. Track the team progress and the outcome in an Excel file. Submit this to training@vinovolo.com with your Word document.

3. Using the most recently updated COGS sheet, choose one flight from the wine menu and answer the following questions:
   - Flight name:
   - What is the price of the flight?
   - How much is the $ margin?
   - What is the COGS % of the flight?

4. Submit the safety self-inspection sheet you completed with your trainer.
After completing this module, you should know:

- COGs worksheet
- How to manage wine/flight changes
- Tracking and recording procedures
- How to handle landlord interactions
- Store Visit Report self assessment management
- How to monitor and report store issues
- How to monitor store safety and respond in an emergency
- How to use basic Microsoft Office programs

SENIOR WINE ASSOCIATE TEST

Once you have finished the training, homework, and discussion questions for all Senior Wine Associate modules, you will be able to schedule a test with your GM during the quarterly open testing period. On the following page you will find a practice quiz on the information contained in this module. The test may include questions on information provided by any of the content in this module, including videos and articles.

If you do not reach the required 80% pass rate on your test, you will be able to retake it during the next quarter’s open testing period. A passing grade on this test is one of the requirements to be considered promotion ready for a Senior Wine Associate position.
The following questions are examples of the type of information that will be required of you on the exam. It should be noted that these particular questions may or may not be asked. You will be expected to show competency over the entire module.

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>What are some strategies for improving Wine COGs in the store?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2</td>
<td>Where does branded material such as tasting and menu sheets come from?</td>
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<tr>
<td></td>
<td>3</td>
<td>List five responsibilities on &quot;self-inspection checklist&quot;.</td>
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<tr>
<td></td>
<td>4</td>
<td>Which two documents should be uploaded to the Wine Resources Site at the end of every month?</td>
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<tr>
<td></td>
<td>5</td>
<td>When formatting a wine menu, what information is found on Line 2 of each wine description?</td>
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<tr>
<td></td>
<td>6</td>
<td>What are four of the items that should always be stocked in your first aid kit?</td>
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<tr>
<td></td>
<td>7</td>
<td>Which apps do we use frequently in our store’s daily operations?</td>
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<tr>
<td></td>
<td>8</td>
<td>Give four examples of events you can schedule in your Outlook calendar to help keep yourself and the store organized?</td>
</tr>
<tr>
<td></td>
<td>9</td>
<td>Where can you find a list of the Standard Naming Conventions for wine?</td>
</tr>
<tr>
<td></td>
<td>10</td>
<td>What preventative maintenance procedure is done on the dish machines to keep them in top working order?</td>
</tr>
</tbody>
</table>
LEADERSHIP: MODULE OVERVIEW

You don’t need the title of Senior Wine Associate in order to be leader, but once you are a Senior Wine Associate, your leadership skills will be essential to the success of your store.

This module will introduce you to the following:

- **Team Leadership** - Leading a team is very different from being an individual contributor.
- **Communication** - Effective, professional communication, both verbal and written, is important for interacting with your team, others inside the company, and store business partners on behalf of the company.
- **Stress Management** - A leadership role, such as that of Senior Wine Associate, is a big responsibility. It is important to be prepared to deal with the stress of assisting with the management of your store and leading your team.
PREPARATION

Before starting this module, you should go back and review Module 4 of the Wine Associate Service Manual, where you can find the building blocks for the concepts covered in this module. This will give you a point of reference for delving further into how these concepts apply to your role as a Senior Wine Associate.

LEAD BY EXAMPLE

As a Senior Wine Associate, the team will look to you for guidance on what is acceptable behavior and what is not. Make sure you are setting the highest possible standard for service, salesmanship, and professional conduct in the store. By stating an expectation, you are setting a explicit standard. However, your actions set implicit standards as well. Make sure that what you say and what you do are in alignment. One of the most difficult adjustments for team members taking on a new leadership role is the transition from being a singular member of the team to being a representative of the company as a whole.

Review the article, “Are You Sure You Want to Be a Manager?” which provides further insight on making that transition. It can be found by:

1) Following this link https://hbr.org/2015/09/are-you-sure-you-want-to-be-a-manager
2) Accessing the Training Resources Site, clicking on the Articles tab, selecting the article “Are You Sure You Want to Be a Manager?” under the New Managers topic

BUILDING TRUST

Trust is the foundation for building strong teams, creating a positive work culture, and producing results. When there is trust in the workplace, people take ownership of their responsibilities, help each other out, communicate more often and are more productive. As a leader, there are several ways you can help to build trust:

1. Be honest - People will trust you if they can count on you to tell the truth, even when this is hard. This includes telling the truth about yourself, or about any mistakes you've made. People will value this level of honesty and will likely reciprocate.
2. Be a good role model - When you "walk the walk," your team will start to do the same, and an atmosphere of trust will develop.
3. Be transparent - People will also trust you more if they can see, at any time, why decisions are being made. The more transparent you are with information the more people will understand why you do what you do.
4. Give feedback - Help people grow by setting clear goals and giving them the autonomy and tools to reach them. Provide consistent feedback along the way. Tell them what your expectations are and when they have and have not met them.
5. Show you care - Trust is built when someone sees that you truly value them as a person and not just an employee. Take the time to learn about them personally and what their goals are. Take time to praise them and frequently ask for their input.
6. Show respect – Always show respect to everyone. Ask for people for their opinions and ideas and actively listen to them. Showing respect doesn’t mean you have to agree with everyone but when you honor their feelings, it builds trust.
Access the article “French and Raven’s Five Forms of Power” for more details on forms of power and the positive use of power in leadership by:
1) Following this link
   https://www.mindtools.com/pages/article/newLDR_56.htm OR
2) Accessing the Training Resources Site, clicking on the Articles tab, selecting the article “French and Raven’s Five Forms of Power” under the Leadership topic
COMMUNICATION

As we discussed in depth in the Wine Associate Service Manual, engaging in effective communication among team members is an integral piece of building a strong team. Applying the concepts you learned as a Wine Associate to leading your team as a Senior Wine Associate can make the difference between a team that follows your instructions because you have legitimate power due to your position within the organization, and a team that follows your instructions and your model of behavior because they believe that you are worthy of leading them – your referent and expert power. Learning to convey your values and goals to the team in a motivational and organized way is just as important as actively listening to them in turn.

WRITTEN COMMUNICATION: EMAIL

In today’s fast-paced world, information is sent and received more rapidly than ever before. But how do you ensure that the messages you are sending are effective, acceptable, and will be taken seriously? The use of proper email etiquette is the cornerstone for ensuring your message gets across quickly, appropriately, and concisely.

The five basic elements all e-mail messages should include, and guidelines for using them correctly, are as follows:

From field – This field should contain the full name of the sender, with initial letters capitalized.
Subject line – The subject line should summarize the purpose or content of the message succinctly, using a maximum of five to seven words.
Greeting – This should reflect the desired tone of the message, based on the appropriate level of formality in your relationship to the recipient. It identifies the recipient by name and provides a courteous opening.
Message body – The body should comply with the basic rules for email etiquette. It should convey the appropriate tone, avoid inappropriate formatting, and use proper composition, and be written clearly and concisely.
Closing – This signifies that a message is ending and should use a tone consistent with that used in the message body.

Most Effective Email Closings*

*Based on lift from average response rate of all emails in sample (47.5%)

- THANKS IN ADVANCE: 38.3% increase
- THANKS: 32.6% increase
- THANK YOU: 21.9% increase
- CHEERS: 14.5% increase
- KIND REGARDS: 13.5% increase
- REGARDS: 12.6% increase
- BEST REGARDS: 11.4% increase
- BEST: 7.8% increase
To use email effectively, you should adhere to seven basic rules of email etiquette:

**Always monitor the tone of email messages** – Ensure you use a tone that’s appropriate for the person you’re addressing and the purpose of a message. Write clearly and unambiguously to prevent accidentally implying a tone that’s inappropriate.

**Avoid inappropriate formatting** – Avoid using uppercase letters and underlining or bolding text. This is unprofessional and may be interpreted as aggressive.

**Use proper composition** – Check that points flow clearly and logically, and that messages don’t contain basic errors in spelling, grammar, and punctuation.

**Answer messages you receive within a reasonable time** – Answer e-mail messages you receive promptly, within a 24-48-hour window. If you will not be accessing or responding to email for longer than that, an out of office message should be set up.

**Keep your responses simple and to the point** - Don’t include unnecessary information. The sweet spot for email length is between 50 and 125 words.

**Answer all questions in emails you receive** – Ensure you check what information has been requested and provide this in a single response. Also anticipate additional information that may be required and include this as well.

**Proofread your emails** – Check e-mails once you’ve written them and correct any errors, instead of sending them immediately. Just one typo in the subject line can decrease response rates by 15%!

**Create a signature for your emails** – Configure a signature for all your e-mail messages that includes your full name, position, and contact details, to make it easier for recipients to contact you.

How to create an email signature in the Outlook 365 web app:

1. Click the settings gear menu in the upper right-hand corner of app.
2. Select View All Outlook Settings.
3. Under Mail > Layout > Compose and reply > you will see Email Signature and a text box
4. In the text box, create your signature using the elements outlined above. You can use the toolbar to change the font, font size, etc.
5. Check the Automatically include my signature on new messages I compose box to append your signature to all outgoing emails including replies and forwards.
6. Click Save.
In addition to the basic rules and etiquette, there are a few other common mistakes you should know about.

The first mistake is the use of “reply” versus the use of “reply all.” There will often be multiple people included in an email regarding a matter that touches several different departments. When replying to such an email thread with an email that is meant to be a part of the larger conversation, be sure to “reply all” so that the email goes to everyone. It can make it very difficult to follow the thread of a conversation if several people do not have all of the information. Likewise, if your response is meant for only one person, be sure that the only the email address in the “To:” box is that of the individual to whom you intend to reply. Your tone or comments may be very different with one person versus the whole group, and it can create an embarrassing and awkward situation if people receive comments that were not meant for them.

The second common mistake is sending attachments improperly. All attachments should be named in a self-explanatory manner. Often when you scan or download a document, your computer automatically creates a name for the document, such as Scan002 or Download59. It is important to rename these documents so that you can properly organize and find documents on your computer. If the document you are sending is multiple pages, be sure to use your document scanner tray or your scan software to ensure the pages are combined into one document. Lastly, be sure to send documents in the requested format. The recipient will usually specify which format they need.

JPEG format should not be used for documents unless requested, as this is a picture format, which does not convert well to most document-based programs.
STRESS

We all deal with stress on a daily basis. It can be generated at work, at home, or even within ourselves. When you become a SWA, your responsibilities will increase, which in turn increases the potential for stress. It is difficult to lead a team effectively when we are reacting to stress, because it increases anxiety and irritability and can lead to poor decision-making. In addition, stress has negative effects on our health, interfering with our sleeping and eating habits, raising our blood pressure, and decreasing our concentration and memory. It is important that you learn to deal with stress effectively in order to remain an engaged leader and to maintain your health.

Access the article “Albrecht’s Four Types of Stress: Managing Common Pressures” for more details on common causes of stress and how to deal with them, by:

1) Following this link https://www.mindtools.com/pages/article/albrecht-stress.htm OR
2) Accessing the Training Resources Site, clicking on the Articles tab, selecting the article “Albrecht's Four Types of Stress: Managing Common Pressures”, under the Wellness topic

Some basic ways to combat stress and its effects:

- Mindfulness
- Exercising
- Discussing stressors with peers
- Organizing your time and prioritizing your tasks
- Spending time with friends and family

<table>
<thead>
<tr>
<th>PHYSICAL</th>
<th>MENTAL/EMOTIONAL</th>
<th>BEHAVIORAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aches and pains</td>
<td>Anxiety/Bouts of worry</td>
<td>Deterioration of hygiene or appearance</td>
</tr>
<tr>
<td>Lightheadedness/Dizziness</td>
<td>Apathy/Lethargy</td>
<td>Increased alcohol consumption or smoking</td>
</tr>
<tr>
<td>Gastrointestinal issues</td>
<td>Confusion/Disorientation</td>
<td>Disruptions in sleep patterns</td>
</tr>
<tr>
<td>Skin issues</td>
<td>Low or depressed mood</td>
<td>Restlessness and fidgeting</td>
</tr>
<tr>
<td>Headaches</td>
<td>Fatigue</td>
<td>Irritability and aggression</td>
</tr>
<tr>
<td>Heart palpitations</td>
<td>Forgetfulness/Memory lapses</td>
<td>Tearfulness</td>
</tr>
<tr>
<td>High blood pressure</td>
<td>Lack of focus</td>
<td>Appetite changes</td>
</tr>
<tr>
<td>Shortness of breath</td>
<td>Panic attacks</td>
<td></td>
</tr>
<tr>
<td>Trembling/Twitching</td>
<td>Difficulty making decisions</td>
<td></td>
</tr>
<tr>
<td>Jaw clenching and grinding</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
THE HAPPY SECRET TO BETTER WORK

Every day is another chance to work toward injecting positivity into our own life and into our team. Let’s explore some ideas surrounding positivity with this presentation entitled “The Happy Secret to Better Work” featuring Shawn Achor. You can access this 12-minute video several different ways.

1) Training Resources site. Access the Training Resources site. Select the tab labeled Videos. This video will be located under Wine Associate Training.
2) Copy and paste the link. If you are viewing this manual electronically, you can copy and paste the link into your browser: https://www.youtube.com/watch?v=fIJsdqxnZb0

According to Shawn Achor’s presentation, lasting positive change starts with making small changes that then ripple outward.

Here are some examples of ways to make small positive changes in your own life:

1. **3 Gratitudes** – Daily application wires the brain to look for the positive first
2. **Exercise** – Teaches your brain that your behavior matters
3. **Meditate** – Allows brains to focus on the task at hand and reduces stress
4. **Journal** – Reflection allows us to relive positive moments
5. **Random Acts of Kindness** – Sharing positivity with others increases the happiness of those around us and magnifies it in ourselves

HOW TO PRACTICE EMOTIONAL FIRST AID

Being an effective leader requires self-awareness and healthy emotional and psychological habits. It can be easy to get caught up in the laundry list of things that need to get done and stop prioritizing our emotional health.

Let’s explore the importance of these concepts in this presentation entitled “How to Practice Emotional First Aid” featuring Dr. Guy Winch. You can access this video by:

1) Accessing the Training Resources site. Select the tab labeled Videos. This video will be located under Wine Associate Training.
2) Copying and pasting the link. If you are viewing this manual electronically, you can copy and paste the link into your browser: https://www.youtube.com/watch?v=F2hc2FLOdhI&t=921s
HOMEWORK ASSIGNMENTS

This homework assignment is to be completed within the body of an e-mail, by using the information regarding proper e-mail etiquette, and submitting to training@vinovolo.com.

1. After reviewing the article “Are you sure you want to be a manager?”, what concerns you most about becoming an SWA; the loss of tribe or simplicity? Why?

2. Why do you want to be a manager?

3. Identify two ways you can develop your expert power to become a great leader at Vino Volo. Explain how these will affect your expert power.

4. Identify two ways you can develop your referent power to become a great leader at Vino Volo. Explain how these will affect your referent power.

5. What are three effects that you experience when you are stressed?

6. Which of Albrecht’s four types of stress do you experience most often? How do you cope with it?

7. What is one thing that you do, or would like to start doing to practice emotional first aid?

8. According to Shawn Achor’s presentation, lasting positive change starts with making small changes that then ripple outward. Over the next week, journal about 1 positive experience you had in the previous 24 hours. Submit five journal entries for five separate days. These journal entries can be sent separately from the rest of the homework questions.
After completing this module, you should know:

- What is means to be a manager
- Why you want to be a manager
- The importance of leading by example
- How to build team trust and commitment
- How to develop and utilize positive managerial power
- How to effectively communicate to lead your team towards team goals and objectives
- How to professionally communicate via e-mail
- The common causes of stress and how stress affects you
- How to cope with stress and maintain emotional health

**SENIOR WINE ASSOCIATE TEST**

Once you have finished the training, homework, and discussion questions for all Senior Wine Associate modules, you will be able to schedule a test with your GM during the quarterly open testing period. On the following page you will find a practice quiz on the information contained in this module. The test may include questions on information provided by any of the content in this module, including videos and articles.

If you do not reach the required 80% pass rate on your test, you will be able to retake it during the next quarter’s open testing period. A passing grade on this test is one of the requirements to be considered promotion ready for a Senior Wine Associate position.
## PRACTICE QUESTIONS

The following questions are examples of the type of information that will be required of you on the exam. It should be noted that these particular questions may or may not be asked. You will be expected to show competency over the entire module.

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<thead>
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<tbody>
<tr>
<td>1</td>
<td>What is the difference between explicit and implicit standards?</td>
</tr>
<tr>
<td>2</td>
<td>What are the six forms of power?</td>
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<td>3</td>
<td>What are the two most effective, positive forms of power when they are combined. Give an example of each.</td>
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<td>4</td>
<td>What are five of the basic elements of all email messages?</td>
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<td>5</td>
<td>Why is it important to monitor the tone of email messages?</td>
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<td>6</td>
<td>What is the maximum amount of time in which you should answer an email?</td>
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<td>7</td>
<td>Give an example of when you should use “reply” instead of “reply all” when responding to an email.</td>
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<td>8</td>
<td>What are the four types of stress? List one way to deal with each of the four types.</td>
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<td>9</td>
<td>How can applying the “3 Gratitudes” method improve your outlook on work and life?</td>
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<td>10</td>
<td>What are 4 ways to build trust?</td>
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