

Admin Training Exam

I. GENERAL OVERVIEW

- i. Practice and understand each of the following tasks.

Task	Initial
Phase A - Booking a Trial and Signing Up	
Answer Inquiry Phone Call (Incoming & Outgoing)	
Book Trial on Calendar, Send Confirmation, Update Pipedrive	
24 Hr Reminder Call	
Greet Trial at Front Desk (Introductions)	
Post Trial Interactions at Front Desk	
Sign up Student, Take Payment, Add to Calendar, Confirmation & Policy Email, Update Pipedrive	
Alternatively, Follow up with Trial via Phone/Email	
Phase B - Absences	
Process absence WITH 24 Hrs Notice	
Process absence NO 24 Hrs Notice	
Special Exceptions	
Phase C - Cancellations	
Process Cancelations	
Phase D - Settling Invoices/1st of the Month	
How to Process an Unsettled Invoice	
Phase E - Dealing with Clients (Angry, Happy etc..) Taking a Leadership role	

Management Signature

Date