**OTA Franchisee Training: CHECKLIST**

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| **Unit 1: Start Up** |  | **Unit 2: Set Ups** |  |
|  |  |  |  |
| Document Dump |   | Office Needs |   |
| Start Up Guide Reading |   | Outlook |   |
| Preliminary Exercises |   | ShareFile |   |
|  |  | Website  |   |
|  |  | Banking |   |
|  |  | Credit Card  |   |
|  |  | Insurance |   |
|  |  | QuickBooks |   |
|  |  | Payroll |   |
|  |  | Background Checks |   |
|  |  | Equipment Ordering |   |
|  |  | Gear Ordering |   |
|  |  | Marketing Ordering |   |
|  |  | Merchant Account  |   |
|  |  | The Hub |   |
|  |  | Jumbula |   |
|  |  | Territory Materials |   |

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| **Unit 3: Course Work**  |  | **Unit 4: Course Work** |  |
|  |  |  |  |
| QuickBooks Course |   | The Program Course |   |
| Child Protection Course  |   | OTA Business Course |   |

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| **Unit 5: Investigations** |  | **Unit 6: Training Exercises**  |  |
|  |  |  |  |
| Market |   | OTA Mission Statement |   |
| Staff Recruitment  |   | HIGH FIVES Priority |   |
| Workforce Pools |   | Job Description |   |
| Requirements |   | Program Descriptions |   |
| Competitor  |   | Catalogue Notes |   |
| Brand Awareness |   | PDC's |   |
|  |  | Management Q&A |   |
|  |  | 1 on1 Moments  |   |
| **Unit 7: IHT System** |  |
|  |  |
| IHT |   |
| Employee Handbook |   |
| In-Take Packet |   |
| Program Instructor Staff Handbook |   |
| PDC PowerPoint |   |
| Video 1 |   |
| Video 2 |   |
| Video 3 |   |
| Instructor Folder |   |
| OTA Landmines  |   |
|   |   |
| Instructor Folder |   |

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| **Unit 8: Cont. Training Program** |  |
|  |  |
| PowerPoint |   |
| Exercises |   |
| Quizzes |   |

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| **Unit 9: Summer Session** |  |
|  |  |
| Summer Camp Handbook |   |
| Tutorial |   |
| Professionalism Quiz |   |
| Technique Quiz |   |
| Teasing and Bullying |   |
| Harassment  |   |
| Summer Training Booklet |   |
| Summer Camp Training Presentation |   |
| Director Quiz |   |
| Camp FAQ's |   |
| Game Plan and Emphasis |   |
| Camp Landmines  |   |