**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 |  |