

RM Selling Solutions

Business Development Consultant

Selling – Quality - Leadership

Cover page:

Company Name and a brief bullet point statement of what your service or products are.

**** Keep it simple.**

COMPANY PROFILE

RM Selling Solutions was created with the Small Medium size business in mind. Including New Start Up's or maybe you are 3 - 6 months out from opening your business. Specializing in, leadership, quality and selling practices. Helping you to take control your company with a 30,000 ft. viewpoint. Applying core business fundamentals for success.

Founded By Rick Matsi

Having over 26 years of direct related business experience within many business sectors, including, the military, industrial distribution, warehousing/logistics and retail sales

My past experiences have given me great insight, understanding and actual applied use of quality practices, leadership and sales techniques. Success is based on taking our education and experiences and putting them into action.

Company profile:

This is where you want to go into more details about your company. When you started, who you are, what you actually do and why.

**No rule on how much you want to write, or how little.

QUALITY POLICY

Customer Goal

Total Customer Excellence

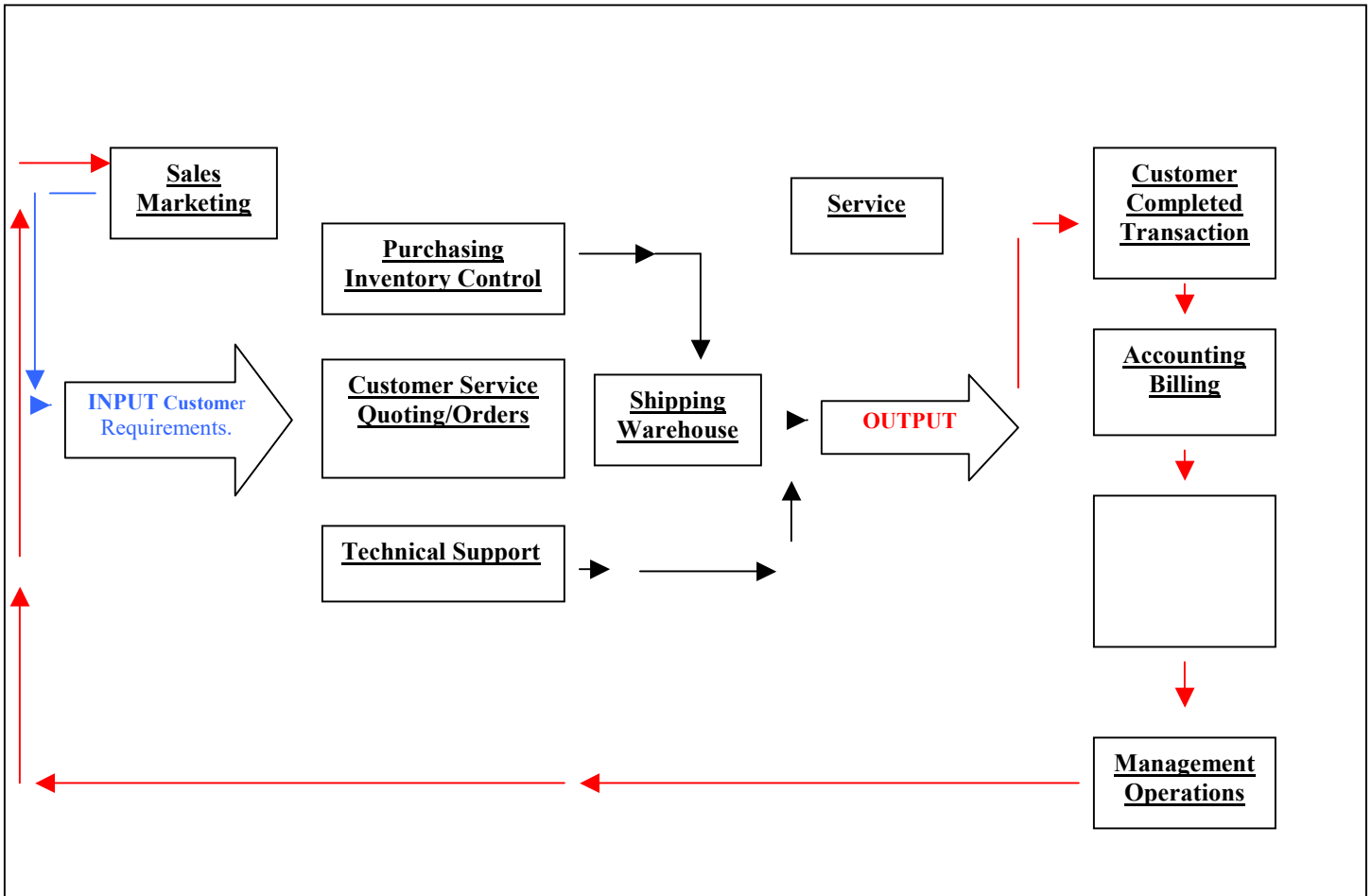
Business Goal

Profitability – Positive Company Branding – Structured for Growth

Quality Policy:

You can also look at this as your mission statement. Short and to the point. This needs to state what you are driving towards. You want everyone in your company and your customers to understand this.

PROCESS FLOW

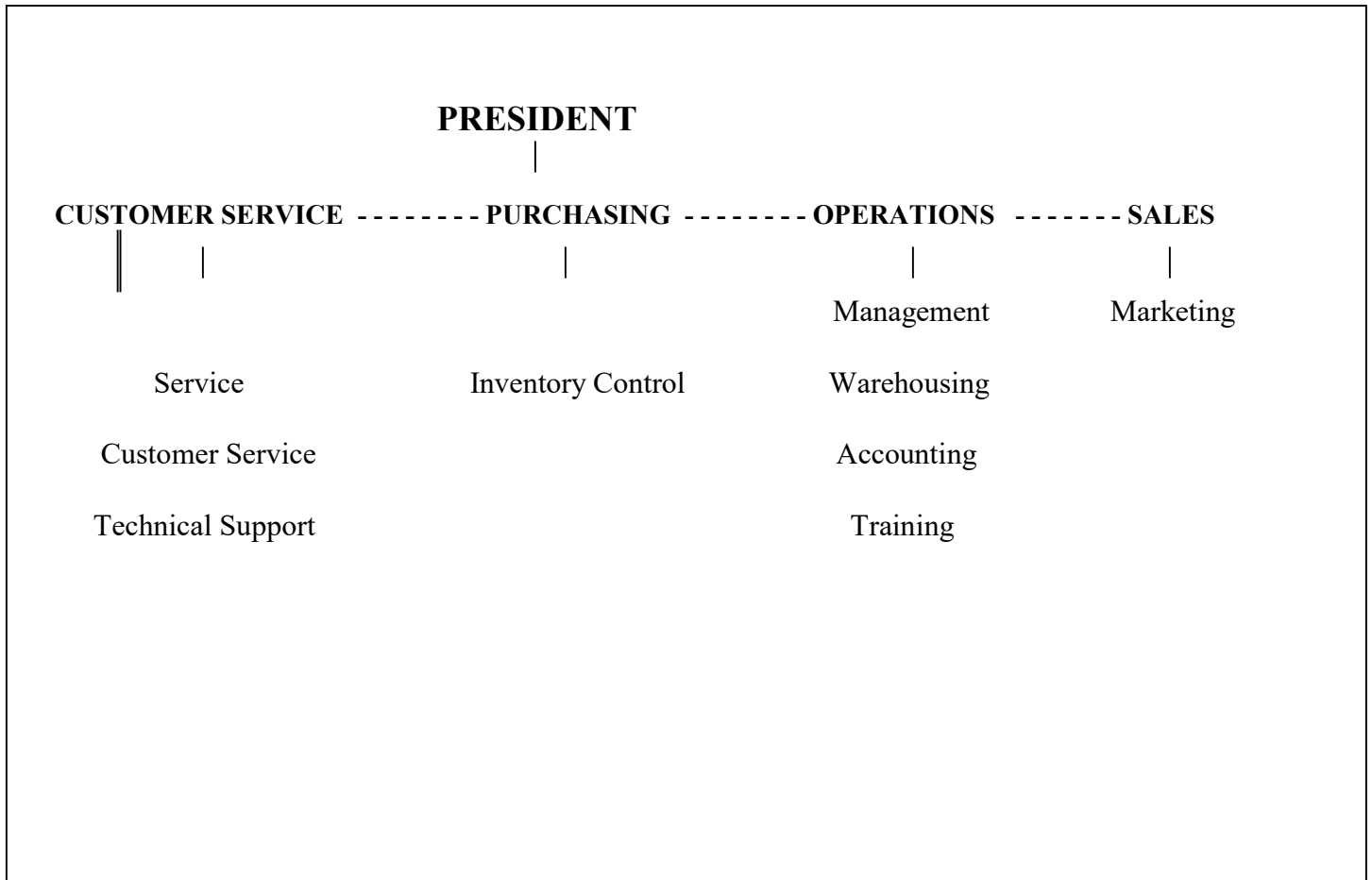


Process Flow:

Or you look at it as your workflow. This shows the starting point from your initial customer interaction and how it flows through to each department within your company. Eventually, becoming a 360 full cycle and starting over.

** Great visual to understand how your company works.

ORGANIZATIONAL CHART



Organizational Chart:

Your organizational chart is a great way to define, understand and to have a simple snap shot of your company structure.
Mapping your Chain of command.
Who works for who

**Above is just a sample of what you could use.

PERSONNEL LIST

NAME	PHONE	EMAIL	POSITION
Rick Matsi	714-615-4907	rick@rmesellingsolutions.com	President
			Sales Manager
			Customer Service Manager
			QA Manager
			Purchasing
			Customer Service
			Accounting
			Warehouse Manager
			Technical Support
			Territory Manager

Personnel Lists:

Seems pretty straight forward, but a lot of companies do not have an updated directory, or they do not list every employee and it's not available.

****Every employee must have this available to them.**

AUDIT SCHEDULE

AUDITS ×	MONTHS											
	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
FILING												
PURCHASING												
BUDGETS												
SHIPPING/RECEIVING												
INVENTORY CONTROL												
QUOTING												
ORDER ENTRY												
WAREHOUSING												
INPROCESS/FINAL INSPECTION												
MANAGEMENT REVIEW												
INVOICING												
ACCOUNTING												
RETURNS												
TRAINING												
HOUSE KEEPING												
SALES / MARKETING												
CUSTOMER COMPLAINTS												
AUDITS												
EMPLOYEE REVIEW												
CUSTOMER FEEDBACK												

Audit Date – Planned

Audit Carried Out & Reported

General Audit – Guide Lines

- * Check Each Department / Sectors For compliance with Set Policy’s & Procedures.
- * Use Audit Schedule To Train and Retrain.
- * Select Months You Want to Have Audit Performed.
Example: Maybe **Filing** will be Audited Every 3 Months and **Returns** Every 6 Months.
- * Use Audit Log Form For The Detail Audit and Make Notes then file for later reviews.

INTERNAL AUDIT LOG

<u>DATE:</u>	<u>Department Audit:</u>	<u>NOTES / FINDINGS:</u>	<u>AUDIT COMPLETE:</u>
1.			
2.			
3.			

INTERNAL AUDIT LOG

- * Your Internal Audits are used to ensure we are doing what we say we are.
Are Policy's and Procedures being followed.
- * Use to write notes and findings from your scheduled audits.
- * Use at management meetings.

BUDGET

PURPOSE:

- Budgets are needed to track, keep in check and to maintain profitability.

RESPONSIBILITY:

- *Management*

PROCEDURE:

1. Set monthly budget goals and who is authorized to spend. Have this written out and defined.
2. All expenses are itemized dated and logged.
3. Receipts are kept for reconciliation of all purchases, expenses set out per company goals.
4. Example: If your budget is set at \$100, you will need to make sure this goal is met per your monthly schedule. As time goes on, and you do your internal quality audits, you may need to increase or decrease you budget amounts.

File all paperwork.

CONTRACT REVIEW / Order Entry

PURPOSE:

- To implement the method by which the Organizations capability is matched with customer's requirement.

RESPOSIBILITY:

- Customer Service – Management

PROCEDURE:

1. Customer Service - receive customer order.
2. Customer service enter who to code/who ordered/customer purchase order/quantity / part numbers.
3. Confirm order through contract confirm.
4. Customer Service - check credit references for new accounts.
5. Management or Customer Service - make final decision on new Accounts.

File Paperwork:

CUSTOMER FEEDBACK

PURPOSE:

- To evaluate company performance from the customer perspective.

RESPONSIBILITY:

- Management

PROCEDURE:

1. Noting any customer suggestions.
2. Reviewed in management meetings.
3. Reviewed with employees
4. Employee training.

EMPLOYEE REVIEW

PURPOSE:

- Continual Evaluation of Employee Performance.

RESPONSIBILITY:

- Management

PROCEDURE:

1. Using employee review metric sheet.
2. Discuss areas of improvement, areas where employee is exceeding.
3. Review Policy and procedures.
4. General Discussions.
5. Set Expectations.

RECORD RETENTION/ Filing

PURPOSE:

- Filing is for record retention and ease of access for client information.

RESPONSIBILITY:

- Customer Service

PROCEDURE:

- Electronic filing. (On computer)
- Traditional hard copy filing with a file bin or filing cabinet.
- Both filing options will need some type of organization in a sense of how and what order your files will be in.
- You can file by:
 1. Alphanumerical order. (By company name then in order by date)
 2. Date order. (Filing by date of transaction.)

All hardcopy paperwork or electronic copies need to be filed. i.e.. Invoicing, shipping documents, customer quotes, supplier information, receipts

INTERANL QUALITY AUDITS

PURPOSE:

- To ensure compliance with stated policy's and procedures.

RESPONSIBILITY:

- Management

PROCEDURE:

1. With the use of your set Audit Schedules:
2. Walk through and check each department to ensure procedures are being followed.
3. Audit information is logged on Audit Log Form
4. If changes are made or discrepancies are found, notes are made to the Audit Log Form.
5. Review Audit Findings.

File all paperwork.

INVENTORY CONTROL

PURPOSE:

- To maintain proper Inventory levels, inventory locations.

RESPONSIBILITY:

- Management

PROCEDURE:

1. Quarterly Inventory Control.
2. Part number, Qty's, location
3. Review Discrepancies
4. Update Inventory System
5. Shelving, Location placement.

INVOICING

PURPOSE:

- To accept payments and to complete customer transactions.

RESPONSIBILITY:

- Management / Customer Service

PROCEDURE:

1. Using PayPal Business Invoicing for billing services.
2. Electronic Invoice's are sent via email to our clients.
3. Client has two options to make payment.
4. If they have a PayPal account, they can pay with PayPal with most major credit cards. If wanting to pay by check, they will have to have a PayPal account setup.
5. If client does not have a PayPal account they can still make a one-time payment with PayPal with credit cards only. Simple Pay and go option.

MANAGEMENT REVIEW

PURPOSE:

- Continual review of overall company performances.

RESPONSIBILITY:

- Management

PROCEDURE:

1. Set Schedule dates review entire company performance.
2. Review.
 - a. Internal Audits
 - b. Employee Reviews
 - c. Customer Complaints
 - d. Training / Training Questionnaires
 - e. Customer Questionnaires
 - f. Sales Data
 - g. Continual Reviews
 - h. Quality, Leadership, Sales

PURCHASING

PURPOSE:

- Sources components, parts and supplies from approved suppliers. Sets proper inventory stocking levels.

RESPONSIBILITY:

- Purchasing – Management

PROCEDURE:

1. Purchases orders are placed per customer requirements.
2. Blanket orders are reviewed per customer contracts.
3. Continual review for best pricing with suppliers.
4. Updates status of all in coming components, parts and supplies.

Informs Customer Service, Management of any changes related to pending orders.

QUOTATIONS

PURPOSE:

- Providing a way to advise pricing, delivery schedules or special details per customer inquires.

RESPONSIBILITY:

- Customer Service - Management

PROCEDURE:

1. Inquires submitted from customers are assessed by Customer Service.
2. Customer Service provides pricing, delivery schedules, special requirements per company policy's.
3. Quotations are valid for 30 – days.
4. Customer Service or designated representative follows up on outstanding quotes for status and provides re-quotes if necessary.
5. Any special customer requirements are reviewed.
6. Return Policy's are listed on quotations.

File all Paperwork.

RECEIVING INSPECTION

PURPOSE:

- Provides a means to verify in-coming products ordered or returned products.

RESPONSIBILITY:

- Warehouse Personnel / Customer Service.

PROCEDURE:

1. Goods signed for by UPS, FedEx or other delivery company.
2. Received goods are brought to a designated receiving location.
3. Goods are received per shipping documents/ checked and entered into inventory system.
4. Products, if not being pulled for immediate orders, are placed into stock locations pending future orders.
5. All boxes are broken down placed in the trash, or stored for future shipments.
6. Received Goods are data entered into inventory system.
7. Products are received into your inventory system and assigned to pending orders.
8. Pick Tickets are printed for pending orders.

File paper work.

PROUDUCT RETURN PROCESS

PURPOSE:

- To return any product back to inventory, to original supplier, or to a supplier, for evaluation.

RESPONSIBILITY:

- Customer Service – Management

PROCEDURE:

1. Return Requests are processed and completed by designated representative.
2. Paper work is filled out reviewed and is either approved or denied authorization for return.
3. Customers are notified of status and what paper work and where to send return product.
4. Product is reviewed and paper worked completed.
5. Final Paperwork is sent to accounting to complete or designated representative. .

STRUCTURE:

RETURN SHELF CLEARLY MARKED.

ALL PAPERWORK IS FILED.

SALES/ MARKETING

PURPOSE:

- To promote products and services to new or current customers.

RESPONSIBILITY:

- Management

PROCEDURE:

1. How you advertise.
2. Email campaigns.
3. Tele-Touch Calls.
4. Direct Mailers.
5. Outside Sales.

SHIPPING

PURPOSE:

- To ship products accurately per customers requirements.

RESPONSIBILITY:

- Warehouse – Purchasing – Inventory control

PROCEDURE:

Packing Slip and Shipment completion:

1. Pick Ticket(s) are confirmed in (Shipping Screen) or how you update your shipments.
2. Enter pick ticket number in shipping screen.
3. Enter tracking number.
4. Enter freight costs. (If not collect)
5. Select Confirm, and then select print packing slip.
6. Update to print packing slip.
7. ** Place packing slip on outside of shipping box or inside.
8. Move completed shipment to outbound designated shipping area. (Pending pick up)

Outbound Shipments:

1. Package product in correct size box and have proper amount of packing material inside for protection.
2. Input data with preferred shipping software. (Ship info, order#, PO #) calculate shipping weights, create shipping label. ***** FedEx, UPS, DHL, and other carriers similar, will have different steps for processing shipping labels. *****
3. Place shipping labels on outside of box, attached tracking number label to pick ticket, place pick ticket in process bin. (Or file)

SHIPPING / In-Process & Final Inspection

PURPOSE:

- Providing guidance for proper pulling and placement of pending shipments.

RESPONSIBILITY:

- Warehouse Personnel.

PROCEDURE:

In-Process Inspection

1. Pull parts from pick tickets.
2. Place pulled parts on designated area. (Pending Final Inspection - optional)
3. **Final inspection** is carried out in the specific allocated area in the Warehouse, together with picking documents and product.
4. Trained warehouse personnel checks documentation against product.
5. After Final inspection is complete, warehouse personnel initials shipping documents, confirming inspection.
6. Any corrective action needed will be made before product is ready for shipment.
7. Pending shipping process.

File Paperwork.

SUPPLIER EVALUATION

PURPOSE:

- To keep best practices with current suppliers.

RESPONSIBILITY:

- Purchasing – Management

PROCEDURE:

1. Continual review pricing contracts.
2. Delivery schedules.
3. Terms and conditions
4. Advise of late shipments or changes not in compliance.
5. Performance expectations.

TRAINING

PURPOSE:

- The process of providing, general, technical, company and product knowledge.

RESPONSIBILITY:

- Management

PROCEDURE:

1. Ensure all employee' performing job duties per instructions.
2. Enabling customers to make the best decision on product or service selections.
3. Periodic review of company established policies and procedures.
4. Training Questionnaire

QUALITY – LEADERSHIP – SALES 101

PURPOSE:

- Continual knowledge review of on going learning.

RESPONSIBILITY:

- Management – Team

PROCEDURE:

1. Quarterly, monthly review to remind and focus on the basics for success.
2. Understanding the Why's
3. Review of situations.