

Engagement Specialist Orientation



Welcome to PromoWorks a division of Crossmark!

Congratulations on your decision to join our Engagement Specialist population.

We pride ourselves on being the number one company for in store product marketing and sales, as well as consumer engagement!

Accepting an event constitutes your agreement to complete the assignment on the day and during the hours designated by the Client and/or Retailer. You will be expected to follow the Instruction Manual provided by PromoWorks.

You have been assigned a Crossmark email address. Instructions for this are available on the PromoWorks ES Portal under New Hire Orientation Documents. All email communication will be sent to your Crossmark webmail account. Make sure to set up your Crossmark Webmail account right away.

If you misplace your log in information, contact Direct Staffing to resend this information (directstaffingAMS@promoworks.com). You should make it a habit to visit the portal regularly <https://esmyhome.promoworks.com/Portal>, where you will find information/current updates on this and much more:

- Training Materials and Resource Library
- Viewing your scheduled events
- Link to Updating your personal information on Crossmark *Connect* site
- Time reporting
- Entering your PromoReports
- Training Manuals
- Project specific Learning Centers
- Paperwork Policy
- Teamworks Newsletter to keep you informed as to what is going on with fellow PromoWorks team members across the country
- Retailer specific certifications, Sample Safe Certification, Retail Tasting Certification



What is an Engagement Specialist?

An Engagement Specialist is an extension of our clients' brands. We provide face-to-face and on-to-one interaction with shoppers and the brands we represent.

PromoWorks is more than a sampling company...More than a demo company...More than a company that simply hands a product to someone...

We **engage** consumers with a brand...Get them to do more than **try** it...We **introduce** them to it...**Educate** them about it...Get them to **interact** with it, to **understand** it.

We want our shoppers to do more than "like" it. We want them to **connect** with it—Start a **relationship** with it—**buy it**.

An Engagement Specialist does the following:

- **Engages** consumers with a brand
- **Introduce** consumers to a brand
- **Educates** consumers about a brand
- **Encourages** consumers to **connect** with the brand and purchase the item.

Customer Engagement and Creating an Impressionable Experience is Your # 1 Goal!

TIPS FOR A SUCCESSFUL EVENT

- “Love what you do!”
- Products should be freshly prepared and have eye appeal
- **PRIOR** to beginning your event, taste the product(s) you are scheduled to sample prior to the start of the event. NOTE: Tasting the product should **not** occur during the event, as this is the time for the consumers to taste and for you to educate!
 - This only applies to standard food events—***if you are executing an alcohol event, you are not allowed to taste any product.***
- Keep your sampling area clean, neat and organized throughout the event.
- Invite and engage consumers to join you at your table by presenting the product with commitment, excitement and confidence.
- Emphasize the ease of preparation and product value.
- Suggest other items to complement the consumer’s meal.
- During the event, you are a presenter, educator and personal shopper. This is your opportunity to help the consumer make a **personal** connection with the brand.
- You must attract customers, answer questions, and most importantly, engage the customer, enhancing their shopping experience.
- **YOUR GOAL IS TO MAKE THE SALE!**
- You will make sales and create a positive buying experience by sharing your knowledge of the product and by engaging the customer.

How to Increase Your Sales

- **Grab Shoppers’ Attention:** Smile! Entice them to come to your table! Eye contact is critical!
- **Advise:** Glance in the customer shopping cart/basket and suggest how your product could enhance their current product selections.
- **Engage:** Ask the shopper questions that will help you understand their lifestyle. Bonding with the shopper will likely increase their willingness to purchase.
- **Table Setup:** Standard 2 x 4 folding table with extendable legs (refer to the included Ergonomics Information sheet for additional details) is used. Solid black, floor length tablecloth. Some projects will include a plastic, colored overlay/table runner to be used on top of the black tablecloth. Keep your belongings under the table and out of consumer view at all times.
 - NOTE: Some, specific, retailers have tables, at the store, to be used for PromoWorks events. Your Supervisor will inform you regarding this.



Requirements

- **Dress Standards/Requirements:** PromoWorks will provide the Engagement Specialist with the required retailer uniform based upon the stores you will be working in. The Engagement Specialist will be required to wear a white, button-down, collared, long-sleeved shirt, black slacks, black non-slip, closed toe shoes, no interfering jewelry, no cologne/perfume and hair pulled back. (Your Supervisor will explain individual chain expectations, if any, with you).
- **Jewelry Policy:** During events involving food preparation, the following items are **NOT** permitted to be worn:
 - Bracelets, Necklaces, Pendants or Earrings (Facial Piercings, any jewelry that could come loose and fall into the prepared food). Tattoos must be covered during your event.
- **Health/Safety Standards:** We represent our clients and our company by instituting and following industry standard health and safety practices. The safety of the consumer is our number one priority. It is your responsibility to review, understand, and follow our health/safety practices.
- **Sample Safe Certification:** Within approximately 10 business days of processing your Engagement Specialist paperwork. Our company takes pride in every Engagement Specialist being Sample Safe Certified before conducting their first event.

You will receive the Sample Safe Brochure and test with your Welcome Letter. The Sample Safe Certification Brochure and Test can also be found on the PromoWorks ES Portal in the Library under Certifications Category. After reading the *Sample Safe* Brochure, please click on the link to report your information on line or call the 800 number listed and take the Sample Safe Test provided at the back of the booklet. Upon completion, you will receive a confirmation # which you should record in the space provided on the test page.

Report this confirmation # to your Supervisor. Within 2 weeks, you will receive a *Sample Safe* Badge. You are required to wear the *Sample Safe* Badge during ALL events, unless otherwise stated in the manual for the event you are to conduct.

- **Basic Equipment:** Skillet, Toaster Oven, Microwave
- **Equipment Pay:** In areas where equipment has not been provided, by PromoWorks, the Engagement Specialist will be compensated a usage fee for supplying required equipment to conduct the event.
- **Breaks:** Please note that you are required to take meal periods and rest breaks as applicable by law. Please contact your supervisor if you need clarification of when these are applicable.
- **Training Manual:** Contains valuable information on performing your event. Be sure you read the manual and understand the information presented.

Pre-Event Procedure:

- **Booking Process:** Your Supervisor will communicate with you all potential upcoming event opportunities. Upon confirmation, your schedule will be available to you on the PromoWorks web portal. In the event of cancellation, discuss kit movement with your Supervisor.
 - The Training Manual, for each scheduled event, is always available on the portal.
- **Receiving the Kit:** Shipped via FedEx before the event. If not received by Wednesday of the week of your event, call your Supervisor immediately. You will receive an email with tracking information sent to your Crossmark email address. It is important that you check your web mail for this information.
- **Kit Content Verification:** As soon as you receive your kit, check it against the manual for complete contents. If you are missing any material, notify your Supervisor that you are missing a kit, or portions of the kit.
- **Contact with Store Manager:** At least 72 hours/3 days prior to your event, contact the store manager to ensure the product will be available at that store for your event.

Day of Event Procedures:

- Check-in with the store manager.
- Check your event product inventory in the store.
- Always follow the training manual. Do not substitute products unless the substitution product is listed in the Training Manual. Please follow these guidelines:
 - If substitutions are listed in the Training Manual, you do **not** need to call for approval.
 - If supplies are to be purchased at the store and the specific supply is not available, you may purchase a similar generic or store brand item for use, you do **not** need to call for approval. Should you have a question or problem, on the day of or at the time of your event, call the Field Support Staff at 1-800-238-9199, and they will be able to assist you. Always write down the name of the person you spoke with regarding substitutions or the direction given. Be sure to alert your Supervisor after the event of any problems or product substitutions.
 - Set up your table where the manager tells you to. Whenever possible, try to set up near a display of the product you are demonstrating.

- Always build an attractive display of featured products, on your table, for easy sales.
- Be familiar with features, benefits, ingredients, price and location of products.

At the End of Your Event:

- **Have Paperwork signed and Stamped:** A Store Manager's signature and store stamp is required on your event paperwork. In the event that a Manager is not available, a Front Desk/or Customer Service employee can sign and stamp the appropriate forms. Make sure ALL paperwork is signed and stamped before leaving the store. All stores reserve the right to check your cart before you leave. You must comply!
- **PromoReport Reporting:** This is a very important part of your job. Please go to the ES portal and report your event immediately following it's completion. Please DO NOT forget to report your promo report information before 10 PM on the portal, on the day of the event or you can report your information by calling the toll free number at the top of your PromoReport Form. Remember to record your confirmation number on the PROMO REPORT FORM.
 - When you report your event information, on the web, you will see a space where you can record your comments about your event. We encourage all Engagement Specialists for enter their comments in this section.
- **Fill out Paperwork Completely:** Leave nothing blank.
- **Reporting Time and Expenses on the ES Portal:** After reporting your PromoReport information on the ES Portal, remember to Select the New Time and Expense Option and report your time in order to be paid.

Time Reporting Procedure

As of 1/1/2014 all representatives performing events for PromoWorks will be converted to W2 employees for CROSSMARK. As part of that transition you will be required to report time via the Time and Expenses screen within the PromoWorks Engagement Specialist portal for each event scheduled.

- A Log in to: <https://esmyhome.promoworks.com>
- B Click **Menu** and select the **New Time and Expense** option. The first section of the screen is for searching existing entries.
- C Click the **Add** button in the time grid.
- D Select the **project** you wish to report time against from the project (retailer) drop down list.
- E Enter or select the **date** on which the specific work activity occurred.
- F Select the **activity type** that you are reporting time against.

Please note that you are required to take meal periods and rest breaks as applicable by law. Please contact your supervisor if you need clarification of when these are applicable.

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- **What to do with your PromoReport Form, at the End of the Event:** For events at all retailers, except Wakefern (ShopRite), You are no longer required to mail in your paperwork and receipts after each event, however, you are required to hold onto them for up to one year. Periodically, PromoWorks may require you to send in your paperwork and receipts for audits or client compliance.
 - Events executed at **Wakefern**, you are to report you Time and Expenses on the ES Portal, but you will need to mail your PromoReport Forms and receipts in the envelope provided.

Miscellaneous Information:

- **Safety Standards and Requirements:** **NO** samples to children without adult consent; **NO** samples left unattended; **NO** knives or sharp instruments left unattended. Extension cords must be taped down, spills cleaned up immediately, etc. to avoid customer injury.
 - **In the event of accident or injury, you must call your Supervisor and/or the Field Support Team Number immediately at 1-800-238-9199.**

Remember:

ALWAYS READ AND FOLLOW THE TRAINING MANUAL CAREFULLY!

Disclaimer:

Depending on your status, policies and procedures may differ. Always discuss specifics for Chain and Project with your Supervisor.

Product Purchases:

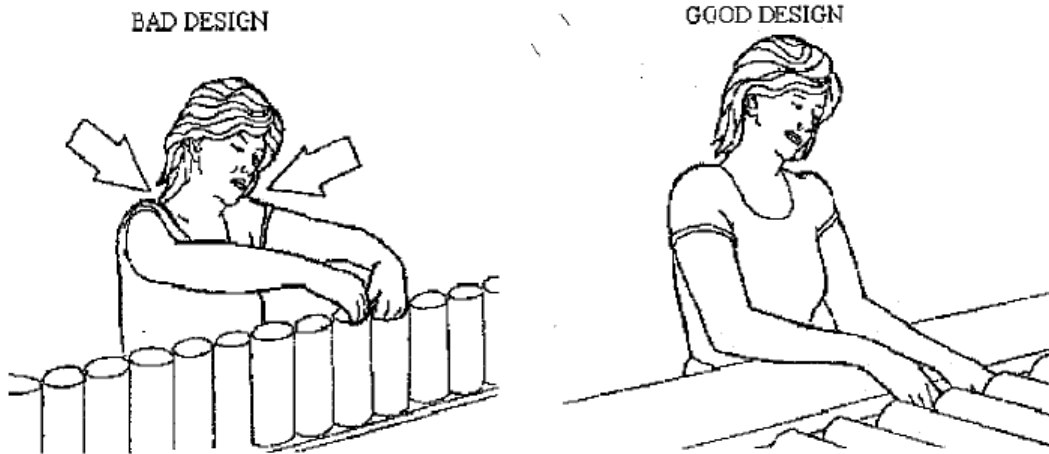
Use the debit card provided in your kit to purchase the product(s) listed in the Training Manual. Your purchase should not exceed the amount listed in the Training Manual.

- **UNAUTHORIZED** purchases will not be tolerated and can lead to termination.
- **Follow purchase instructions found in your Training Manual and SAVE ALL receipts for one year. Audits may occur, from time to time.**
- **LEAVE** any remaining purchased product and/or coupons with the store Manager.
- **NEVER** take any purchased products from the store!
- **IF** you purchase any food or drinks to consume on your meal break, you must pay for the product, at the check out before opening or consuming. The receipt must be kept with you. You must be able to produce the receipt if asked by store personnel.

Suggested Ergonomics

Table height should be set to provide the most comfortable working height. Leg extensions should be utilized to position the table working height at your body's neutral zone. When determining the appropriate height of the work surface, it is important to consider the following factors:

- Your elbow height. Elbow should be positioned so the back can remain straight and shoulders are neither slumped nor lifted.
- The tools and equipment being used. Work should be positioned 8 to 12 inches from the body.
- You should wear shoes that provide good arch support.



Examples of Proper Table Setup



SAMPLING FOOD & SAFETY STANDARDS

Please read the information below and adhere to the requests of the Retailer.

ENGAGEMENT SPECIALIST UNIFORM

- CLOSED TOE, NON-SLIP RUBBER SOLED SHOES REQUIRED. NO HIGH HEALS OR SANDALS.**

THE EVENT AREA

- CONSTANTLY INSPECT** the area around you for product and/or spills on the floor that might cause you or others to slip and fall.
- ALWAYS KEEP EVENT TABLE & AREA SAFE AND CLEAN.**

EVENT EQUIPMENT & UTENSILS

- HOME TEST** all **APPLIANCES** for **SAFETY & SANITATION** prior to the event.
- Make sure all **ELECTRICAL CORDS & EXTENSION CORDS** are in good repair. **TAPE** cords to the floor to prevent tripping.
- IMPORTANT:** BE SURE THAT KNIVES AND OTHER EQUIPMENT ARE **ALWAYS** OUT OF HARMS WAY.
- ALWAYS** use **PROPER UTENSILS, HOT MITTS, ETC.** as outlined in your Event Manual.
- You **MUST** have a **“CAUTION: HOT!”** sign on your table whenever using equipment that gets hot or heats up product.

PRODUCT SAMPLES & ENGAGEMENT SPECIALIST RESPONSIBILITY

- NEVER LEAVE SAMPLES UNATTENDED!!!!!!** If you leave your table for any reason, samples should be **DISCARDED.**
- Be sure that all **SAMPLES** are free from unwanted debris or foreign objects.
- All Recipes and Samples must be prepared **IN-STORE; NEVER** at home.
- NO** samples to minors; all children under 18 must be accompanied by an adult.

STORE SALES FLOOR and BACKROOMS

- Alert Store Managers or other Store Personnel to any spills that pose a threat to you or the customers.
- Please check with store personnel and get assistance when entering backroom storage areas,
- For sanitation purposes, **HAIRNETS / HEAD COVERINGS** must be worn when entering **FOOD PREP AREAS.**

GENERAL SAFETY REMINDERS

- DO NOT LIFT** heavy objects, boxes, etc. Ask for assistance from Store Personnel.
- UNPACK** Event Kits that are too heavy to lift. Break the contents into smaller, lighter packages.
- DO NOT STAND** on **LADDERS, CRATES, BOXES,** etc. for **ANY** reason. Always ask for assistance.
- DO NOT STOCK SHELVES OR DISPLAYS,** this is **NOT** your responsibility. Ask for assistance if necessary.
- Look where you are going at **ALL** times. Be careful when walking in the parking lot.

SAFETY & SANITATION IS EVERYONE'S JOB!

Signature: _____ Date: _____

Reporting Your Event Information

PromoWorks uses the PromoReport Form as its method of collecting event information (example is shown on the next page).

- The PromoReport form is sent to the Engagement Specialist in the event kit. It is found in a plastic sleeve under the shipping label on the kit. Other methods of receiving the PromoReport form, when there is no kit, is through the mail or the PromoReport form can also be sent to the Engagement Specialist by email.
- The PromoReport Form is your way of collecting and reporting information that is specific to each event.
- The PromoReport Form has information that is specific to each event, for example:
 - The Project Number—a six or seven digit number that is specific to your retailer and project
 - The toll free number—the reporting number that is shown at the top of each PromoReport Form. This number can be used to report your event information by phone.
 - The preferred method of reporting event information is via the web, using the PromoWorks ES Portal link.
 - The Store Number
 - The PromoReport Code
 - The Zip Code
- You will bring the PromoReport Form with you to your event. Answer all of the questions and complete all of the requested information.
- You will have the PromoReport Form signed and stamped (store stamp), by the Store Manager or Service Desk Manager for validation of date and time of event execution.
- Except for Wakefern (ShopeRite) or specifically designated events, you will not need to send in the report form and receipts. You will report your time and expenses on the PromoWorks ES Portal, and keep your PromoReport Form and receipts for each event for one year.
- For Wakefern (ShopeRite) or specifically designated events, where you are required to mail in your PromoReport Form and receipts, PromoWorks will include a return envelope in your kit, and you will keep copies of your PromoReport Form and receipts.
- We have included a sample of a PromoReport Form on the next page.



Safeway PromoReports® Form
Tabasco Chipotle Pepper Sauce - 2200322



It is mandatory that you call into PromoReports® at (888) 295-0278 upon completion of event.

Your name: _____ . On my Pre-Call Date of _____ , I called this store and
 (your name) (pre-call date)
 spoke with _____ and verified that this event will take place on _____
 (pre-call contact name) (event date)

When calling into Safeway PromoReports®, please make sure to use the STORE # & ZIP CODE provided below:

Store Number	273	PromoReport Code	91
Store Name	Safeway	Phone Number	(530) 365-6401
Store Address	2601 BALLS FERRY ROAD ANDERSON, CA 96007		
Time In: _____	Time Out: _____	Original Confirm Date:	05/22/2010

Before calling into Safeway PromoReports®, please answer the following questions:

- | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|---------|
| 1.) Enter the project number of the program you executed: | 1.) | 2200322 |
| 2.) Enter the Store Number listed on your Safeway PromoReports Form: | 2.) | 273 |
| 3.) Enter the Store's Zip Code listed on your Safeway PromoReports Form: | 3.) | 96007 |
| 4.) Enter the PromoReport Code number listed on your Safeway PromoReports Form: | 4.) | 91 |
| 5.) Enter the month in which you worked:
(For January, enter 01, etc) | 5.) | _____ |
| 6.) Enter the date in which you worked:
(For the 26th of the month, enter 26, etc) | 6.) | _____ |
| 7.) Enter your 7 or 8 digit PromoPin number from your PromoPin card. | 7.) | _____ |
| 8.) Were you able to execute your event upon arrival at store?
Enter 1 for yes
Enter 2 for NO, Manager refused event upon arrival
Enter 3 for NO, No product at store upon arrival | 8.) | _____ |
| 9.) Enter the beginning inventory of Tabasco Chipotle Pepper Sauce: | 9.) | _____ |
| 10.) Enter the ending inventory of Tabasco Chipotle Pepper Sauce: | 10.) | _____ |
| 11.) Was there a secondary display of Tabasco Chipotle Pepper Sauce?
Enter 1 for Yes
Enter 2 for No | 11.) | _____ |
| 12.) Enter the total number of samples distributed: | 12.) | _____ |
| 13.) Enter the total number of coupons distributed: | 13.) | _____ |
| 14.) Did you sell out of all the product being promoted?
(If no enter 0, if yes enter the number of hours the product lasted before running out, ex: enter 3 for 3 hours, enter 4 for 4 hours, etc) | 14.) | _____ |
| 15.) Enter the total number of packages (units) used for sampling: | 15.) | _____ |
| 16.) Enter the price of Tabasco Chipotle Pepper Sauce: | 16.) | _____ |
| 17.) In your opinion, what percentage of consumers had already heard of Tabasco Chipotle Pepper Sauce?
Enter 1 for 0-25%
Enter 2 for 26%-50%
Enter 3 for 51%-75%
Enter 4 for Over 75% | 17.) | _____ |
| 18.) In your opinion, what is the overall likelihood that consumers you spoke with today will purchase Tabasco Chipotle Pepper Sauce?
Enter 1 for Very Likely
Enter 2 for Likely
Enter 3 for Neither Likely nor Unlikely
Enter 4 for Unlikely
Enter 5 for Very Unlikely | 18.) | _____ |
| 19.) In your opinion, what percentage of consumers had already tried Tabasco Chipotle Pepper Sauce before?
Enter 1 for 0-25%
Enter 2 for 26%-50%
Enter 3 for 51%-75%
Enter 4 for Over 75% | 19.) | _____ |

EXAMPLE

Your information has been received. Your confirmation number is - _____



Safeway PromoReports® Form
Tabasco Chipotle Pepper Sauce - 2200322



It is mandatory that you call into PromoReports® at (888) 295-0278 upon completion of event.

Store Manager's Name: _____

Date: _____

Store Manager's Signature: _____

Time: _____

Store Stamp:

Be sure to immediately mail this report form to your agency. Thank you for your participation!

Please note any consumer comments (Negative or Positive) on the back of the form.

If any coupons are remaining, please destroy them and fill in the below sentence accordingly.

I acknowledge destroying _____ remaining coupons from the event on the date of _____
(amount) (date)

Your signature: _____