

PROFITEDGE TEMPLATE · FOUNDATIONS

Job Aid Template

One routine, one page. Short enough to read while a customer waits, and written around your own system and procedures.

Routine _____

Who does it _____

When it happens _____

Who to ask about an exception _____

1 Why it matters

The reason first. What does this routine protect, and what goes wrong later when a step is skipped?

2 The steps

Give the most words to the steps that get skipped.

#	WHAT TO DO	WATCH OUT FOR
1		
2		
3		
4		
5		
6		

3 Done right means

Last updated _____

Owner of this page _____

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Training Plan by Role

Receiving and the bookkeeper don't need the same training. Plan by role, pick the format the season allows, and set a date to check whether it stuck.

1 Who needs what

- On site
- Remote
- One to one
- Recorded
- Department session

ROLE	PEOPLE	WHAT THEY NEED TO KNOW	FORMAT	WHEN	CHECK BY
Receiving					
Parts and counter					
Department leads					
Bookkeeper					
Buyer					
Owners and managers					

2 Did it stick?

A few weeks later, check one thing for each routine. If it didn't stick, look at the training, the job aid and the routine before you look at the person.

ROUTINE	WHAT TO CHECK	CHECKED ON	STUCK?	IF NOT, FIX THE...

Fix the... training, the job aid, or the routine itself.

The point of training is for the business to need the trainer less.

WANT A SECOND SET OF EYES?
Start a conversation at profitedgesystems.com about training your team.