SRS Implementation Training Plan

These training sessions are organized and facilitated by your Master Data Specialist and VIP Lead Application Trainer. Some sessions are exclusive to Project Sponsor/Admin users, while others will be open to your entire team.

Project Milestones	Topics
Project Kick-Off Call *Est. Duration:* 60 minutes *Attendees:* Project Sponsor(s)	• Provide an overview of the VIP system and solutions. • Review project charter to confirm key stakeholders and milestones. • Share Commitment Letter template for distributors to sign and return to VIP to initiate the data collection process. • Outline process for contacting VIP, accessing resources, and submitting support tickets in VIP Help Center.
Item Catalog Training *Est. Duration: 30*-60 minutes *Attendees:* Project Sponsor(s)	• Using brand/product/package tabs and understanding field dependencies. • Brand creation, product setup, and package size management. • Product groupings and supplier-defined fields (impact on iDIG reporting). • Importing new files: changes in Item Master and formatting requirements.
SRS/Nexus Training *Est. Duration: 30*-60 minutes *Attendees:* Project Sponsor(s)	• Enrollments: certified vs. pending, columns explained, and expected timelines. • Employee master: creating employee records, role-based security, license management, and iDIG login requests. • Distributor hierarchy values and assignments (if applicable). • Item cross-references, error identification, and auditing. • "More" tab: references to webinars, Help Center, and billing tab.

iDIG & KARMA Admin Training(s)
 	
Est. Duration: 60+ minutes
 	
Attendees: Project Sponsor(s)
	• Supplier organization: key accounts, premises, and team segmentation.
	• Supplier priorities: tracking accomplishments, sales/distribution goals, and expansion strategies.
	• **iDIG:**
	  ○ Admin settings and company defaults.
	  ○ Master data setup and hierarchy adjustments.
	  ○ Sales, Distribution, Inventory, and KARMA reports.
	  ○ Dashboards/Teamboards, Team Favorites, and Targets.
	• **KARMA Website:**
	  ○ Survey structure: event, distributor, chain, pricing, and premise type.
	  ○ Survey content: POS, displays, events, and brand set analysis.
	  ○ Custom attributes: creation and management.
	  ○ KPIs and performance metrics.
	  ○ Dashboards and Teamboards.
	  ○ KARMA Share (if applicable).
	• **KARMA Application:**
	  ○ Recap/reporting capabilities.
	  ○ Troubleshooting processes.

Brand Finder Training
 	
Est. Duration: 30-60 minutes
 	
Attendees: Project Sponsor(s)
	• Search history reports: reporting and analysis features.
	• Custom integration types:
	  ○ API (web service): embed code to build into your website.
	  ○ iFrame (VIP Hosted Widget): links directly to your website.
	• Documentation review, including setup references and styling differences.
	• Call Points training (if applicable)
	
	*VIP offers guidance only and does not provide web development services for integrating the Brand Finder tool into your website.

KARMA Team Training *Est. Duration:* 60 minutes *Attendees:* All application users	• Dashboards/Teamboards: navigating and analyzing performance. • Accounts: indicators, map view, filters, layout, custom attributes, notes, and contacts. • Surveys: demo of survey creation, submission, and distributor servicing. • Calendar: visit details, recap management, route planning, and PDF export. • Application menu: contacts, tasks, pricing calculator. • Settings: sign-in/out, KARMA logs
iDIG Team Training *Est. Duration:* 60 minutes *Attendees:* All application users	• Login access/password reset, webinar calendar, and Knowledge Base. • Defaults: cleansed outlet data and last-day-of-sales tracking. • Sales, Distribution, and Inventory reports (including distributor routing). • Dashboard/Teamboard reports. • Support and follow-up processes.
Follow-Up Team Training *Est. Duration:* 60 minutes *Attendees:* All application users	• KARMA Application: updates, questions, and modifications. • KARMA/iDIG integrations. • iDIG advanced features: custom columns, new/lost data, unsold report, KARMA results, gap reports. • Sharing and saving reports. • Refining Dashboard reports and enhancing Call Point functionality.

CCM/Call Points Training (if applicable) *Est. Duration: 60+ minutes* *Attendees:* All application users	**Call Points:** - Navigation and key features. - Dynamic vs. Static vs. Upload: account grouping methods. - Item authorization: approval/mandate process. Call Point types overview. - Call Point reporting in iDIG. **CCM:** - Create events. - Track gaps and inventory alerts by distributor. - CCM/KARMA integrations. - CCM reporting in iDIG.
Transition to On-Going Support *Est. Duration:* 30 minutes *Attendees:* Project Sponsor(s)	- Transition to one of VIP's ongoing support teams. - Each support team consists of subject matter experts who will provide guidance to ensure your long-term success with VIP. - Review the VIP Help Center ticketing system and highlight the available support resources.