

EMD Webinar Program

Staff Standard Operating Procedure

Pre-Session Setup

- ☐ Administrator of the Day signs into Zoom
- ☐ Administrator of the Day opens the breakout rooms
- ☐ Administrator of the Day hits the record button

Admit Room (Main Session Room)

- ☐ Assigned rep starts recording as soon as they are in the Admit Room
- ☐ Assigned rep keeps camera on at all times
- ☐ Rep remains stationed in the Admit Room

When Staff Enters

- ☐ Confirm the person is indeed staff
- ☐ Send staff to the appropriate staff room

When a Guest / Client / Tour Enters

- ☐ Greet them: "Hello and welcome. Are you here for the presentation?"
- ☐ Once confirmed, check the manifest and confirm their name
- ☐ Transfer them to the room labeled Check-In Room
- ☐ Instruct them: "Please keep your camera on and someone will be right with you"

Check-In Room → Host Room #1

- ☐ Host of the Day stands by to accept the tour when they're placed into the Check-In Room
- ☐ Host of the Day enters Host Room #1
- ☐ Host of the Day manually pulls the tour from the Check-In Room into Host Room #1

Check-In Process

- ☐ Confirm all information on the manifest: spelling, dates, numbers, and phone number
- ☐ Confirm the information was entered correctly by the marketer
- ☐ Confirm the tour has appropriate equipment to participate: desktop, laptop, or tablet
 - *Cell phones are not accepted as a general rule; exceptions are at the discretion of the Manager of the Day*
- ☐ Confirm camera and mic are functioning properly
- ☐ Rename the tour: First Name/Second Guest First Name Last Name (State) Time Entered Admit Room
 - *Example: Mark/Jess Alexander (Texas) 5:04*

Transfer to Podium Room #1

- ☐ Advise the tour: camera must stay on at all times
- ☐ If there are two guests, both must stay in frame at all times — no stepping away
- ☐ Microphone must stay on
- ☐ Advise the tour: "This is an interactive presentation and you'll need to converse with the travel advisors, so please be ready to answer questions."
- ☐ Get a verbal confirmation before transferring — e.g. "Y'all good with that? Give me a thumbs up!"
- ☐ Once confirmed, transfer the tour to Podium Room #1

Repeat & Cutoff

- ☐ The rep assigned to check-in (Admit Room) and the Host repeat this process for each tour until presentation start time
- ☐ No tours accepted more than 5 minutes after the presentation start time — reschedule any late arrivals
- ☐ The entire check-in process — from Host Room #1 to transfer into Podium Room #1 — should take no more than 3 to 5 minutes, unless an issue arises that requires more time to resolve

Disqualifying / Reschedule Conditions

A tour must be rescheduled if any of the following apply:

- ☐ They are in a moving car, or in a car at all
- ☐ They are on a cell phone
- ☐ They are in a public place
- ☐ They appear intoxicated, under the influence of drugs, or otherwise out of the ordinary
 - *If they're on the manifest, they should already be properly qualified on all other grounds*

Overage (More Tours Than Reps Available)

- ☐ If there are more tours than staff can handle, speak to the Manager of the Day
- ☐ Most likely outcome: the tour will need to be rescheduled
- ☐ Advise the tour: "Due to overwhelming response to this promotion, we've had an excessive number of people show up and it is first come, first serve. We will need to reschedule you for a future date and time, as it will be necessary for you to attend the presentation."
- ☐ Tell them Karen will reach out to them to get them rescheduled as soon as possible and we apologize for any inconvenience

Status: Draft — more steps to come.