

I have compiled a sample of the process employees go through when training new hires using the Business Structure Manual (employee handbook) I attached. There are specific handbooks and manuals for each department such as front desk, team leaders and managers and technicians.

Technicians: Business Structure Manual (salon policy handbook)  
Procedure Manual (salon procedure training)  
Performance Measurement Manual (certification & performance monitoring)

Front Desk: Business Structure Manual (salon policy handbook)  
Procedure Manual (salon procedure training)  
Performance Measurement Manual (certification & performance monitoring)

Leaders: Business Structure Manual (salon policy handbook)  
Procedure Manual (salon procedure training)  
Performance Measurement Manual (certification & performance monitoring)  
Workbook (calculation guide)  
Leadership training (tools and exercises to lead a team)

Here are a few things you need to know about SOS:

- ✓ The system is designed as a ready made template for salon and spa owners to personalize for their unique structures
- ✓ Although modification is essential, the SOS system includes every aspect necessary in a successful business model
- ✓ SOS creates quality controlled consistency between technicians so owners can brand themselves while building a client base that is loyal to the salon rather than the technician
- ✓ This is an automated system that allows owners to get away from the service area
- ✓ SOS systems are the way to monitor employee performance through the salons most valuable asset, the clients. With this system, clients are holding the salons employees accountable not the owners. The beauty industry has now become accountable to those we serve.

Paragraphs highlighted in red offer an explanation as to the purpose. I do look forward to speaking with you soon, please feel free to call any time at 780-437-3441.

Sincerely,

Cheryl Roose

# Job Descriptions

## Technician

### Objective:

To perform technical skills within the skill certification program.

### Goal:

To be active in building and retaining the salon clientele while being part of a team.

### Personality Traits:

Confident and creative with strong communication skills. Is a good listener. Must be willing to grow and take direction. Must be motivated toward self-improvement. Strong work ethics and a passion for the industry.

## Duties

### Technical Work:

Performing skills congruent with the level of skill certification. Meeting service goals.

### Retail:

Retailing for the clients needs. Meeting retail goals. Gaining the appropriate knowledge in Salon retail lines.

### Presentation:

Presenting yourself with a clean and tidy image and impeccable personal hygiene. Sporting an energetic and enthusiastic attitude with co-workers and salon clients.

### Clients:

Incorporate the Standard of Service.

### Salon Marketing:

Incorporating the salon marketing strategies consistently and effectively.

### Team Work:

Becoming a valuable and respected employee and teammate. Presenting the salon image with unity and respect.

### Accountability:

The role of the technician is to become a peak performing employee of "A" status.

## Technician Checklists

### Shift Checklist

Laundry and coffee cups.

Weekly technician cleaning.

Weekly salon cleaning if Saturday or Tuesday.

Assist team members.

### Arrival Checklist

Arrive 10-15 minutes prior and set up for the day.

Check your appearance, attitude and hygiene.

Check to see how you will fill your appointment book.

Return messages.

### Departure Checklist

Daily technician cleaning.

Daily salon cleaning.

### Client Checklist

Greeting.

Consultation analysis applicable to the service for new clients or the repeat clients.

Lead client to a change room if applicable and instruct client with the procedure and where to meet you when they're ready.

Service related massage.

Current product analysis.

Explanation of service steps and procedures.

Product recommendation.

Home maintenance tips

Industry trend educating.

Lead the clients to the front while informing of the check out procedure with receptionist.

## Salon Coordinator

### Objective:

Build a valuable link between the clients and technicians.

### Goal:

Create sales and positive client relations.

### Personality Traits:

Honest, Responsible and trustworthy individual with a friendly cheerful disposition. Good people skills and mature communication skills. This individual is to be task orientated, organized, neat, tidy and efficient. Must have a clean and professional image.

## Duties

### Front Desk:

Develop and maintain positive client relations and implement front desk policies and procedures.

### Marketing:

Implement the salon marketing strategies for the front desk and telephone.

### Inventory:

Order and track inventory. Display and stock retail area. Implement monthly specials and promote within the salon.

### Salon Maintenance:

Maintain the cleanliness of the client waiting area and front desk. Assist in salon cleanup.

### Meetings:

Meet with team leader and CEO weekly to report marketing and client concerns. Report all data pertaining to technicians in staff meetings.

### Accountability:

This position is held accountable for balanced cash out reports and inventory control within a budget. Completed and organized client relation data and technician monitoring systems are reported to the CEO at every months end. This position is also accountable for providing a fabulous first and last impression of the salon.

## ***Salon Coordinator Checklists***

### Hourly Checklist

Tidy front desk; replenish fragrance oils.

Organize waiting area, magazines and furniture.

Tidy client washroom, wash mirror, replenish towels and toiletries, empty hamper; light new candle if needed.

Wash coffee cups (even one) and replenish beverages, wipe countertops and change towel under rack if needed.

Pull all retails forward.

Do laundry, prepare gowns.

### *Client Check In List*

Stand and greet all clients.

Call client by name and use their name to offer a beverage.

Use client's name and let them know approximately when the technician will be with them.

Let the technician know their client is here, and use client's name.

Check off their name in the appointment book.

### *Client Checkout Checklist*

Ask if their technician made them aware of the salon specials and the S.O.S.

Confirm their address and telephone numbers and email address.

Take the sale.

Give them their checkout envelope.

Incorporate the monthly sales script.

Have client complete a comment card.

Record their name if the S.O.S was done.

Record them on new client sheet if applicable.

### Nightly Checklist

Wipe reception desk off and clear away clutter.

Pull retail forward.

Straighten magazines and wipe waiting area tables.

Clean client washroom sink, empty hampers; refill towels and feminine products, toilet and facial tissues and soap dispenser if needed.

### Daily Checklist

Call the new clients from one week prior each day.

Highlight the telephone number of name called on the new client sheet

### Weekly Checklist

Call all PB's and appointments over 1 hour. Highlight the PB's or highlight a circled "C" for confirmed calls to all new clients from the previous week.

Send out thank yous and referrals (even1), highlight the referrers name on the new client sheet.

### Inventory:

Order and track inventory. Keep shelves clean and products displayed aesthetically. Implement monthly special strategies and promote within the salon using displays and posters. Ordering and receiving process: Compare the back bar and retail inventory numbers to the minimum order list on the computer. Use the order form system to replenish the required numbers of products to be kept in stock. When the products arrive check the accompanying invoice for accuracy to the order form. Check off all products on invoice. Update the inventory in the computer. Price and stock the products received. Mark off the inventory on the order form and record any back orders to the next order sheet. Watch for increase in retail prices and adjust in computer. Lower prices may mean a sale from the supplier; confirm this as well. Be sure to notify the suppliers not to send the back orders to avoid being over stocked. Watch to keep stock within the salon budget.

### Monthly Checklist

Create a monthly special with product and service based on special priced products. Implement the advertising in the salon, on the website and on the phone message.

## Team Leader

### Objective:

Lead team members within salon systems, policies and procedures.

### Goal:

Have team members trained within the skill certification program while reaching their goals and employee status.

### Personality Traits:

Focused, patient, confident and even-tempered. Must know company policies and procedures and lead in a positive and encouraging manner. Clear effective communication skills are required.

## Duties

### Systems and Policies:

Implement the Business Structure Manual. Certify employees in company policies and procedures. Conduct performance measurements. Monitor and assist in any changes that need to be made.

### Office Projects:

Calculate and implement daily salon goals. Document and prepare success reports for technicians. Document and approve holidays, sick days and requested time off as according to manual. Complete the qualification, ABC status tracking graph for the COO.

### Manager Meetings:

Meet with the salon manager and CEO weekly. Report any concerns with employees that need addressing. Organize meetings with team members to implement changes.

### Accountability:

This position is responsible for hiring as well as dismissing employees. This position is held accountable for the technicians reaching and sustaining their goals and skill certifications within a specified time line. The systems and policies are to be trained and implemented by this position as well as performance appraisals and correction procedures.

### Daily Checklist

Hold 15-minute huddle in the mornings to set agendas for the day or prepare daily notes for the week to be handed out by the salon coordinator.

Record goal numbers on goal sheet.

### Weekly Checklist

Record topics for discussion and the minutes of meetings as well as staff reviews.

Record cleaning and performance measurement data.

### Monthly Checklist

**See the SOS workbook for the calculations required below. This is a step by step guide for the process of the employee tracking and monitoring.**

The following is to be completed in the first week of the month.

1. Complete the success report tracking.
2. Complete the qualification status in the ABC employee program.
3. Schedule and conduct meetings to review success reports and qualification status.
4. If specific steps of the Standard of Service need improvement, use the “targets” to monitor. Make an action plan and set a date for improvement.
5. Enforce probation and any disciplinary measures if applicable.
6. Hold the monthly staff meeting. Give out rewards at the staff meeting if applicable according to the team incentive program.
7. Conduct performance appraisals every six months.

**This system is to set up next month's data for employee monitoring and tracking. (use the tool on page 12, client comment card)**

1. In the first week of the month designate two salon clients for each technician from the appointment book to complete the client comment cards. Use the script provided in the Business Structure Manual for requesting client participation.
2. Also in the first week seek out a first time client for each technician to be a mystery shopper.
3. In the first week of the month do an observation of one client per technician to see the SOS and reception in action.
4. Interview a minimum of one non returning client from four months prior to obtain valuable insight for improvement measures.

\*\*Client performance appraisals (page 26) are accompanied with a service gift certificate (date and expire) and a postage paid envelope addressed to the salon.

\*\* Mystery shopper letters (page 31-37) are accompanied with a service gift certificate (date and expire) and a postage paid envelope addressed to the salon.



This is a sample of a salon service standard that can be used as is or modified that is the salon brand. This criteria dictates a client experience in each and every salon visit. This is what is monitored for quality assurance.

## The Standard of Service

1. Welcome greeting
2. Face shape and face map consultations
3. Service related massage
4. Current product analysis
5. Product and technique education
6. Home maintenance tips
7. Tool sanitation in clients view
8. Industry trend updates
9. Referral coupons
10. Beverage of choice
11. Easy pre booking options
12. Confirmation calls

The following is part of the salon POLICY certification.

## POLICIES

### Dress Policy

Answer true or false.

Wearing colored denim pants is acceptable attire for work.  True  False

Sleeveless shirts are acceptable work attire.  True  False

How I dress attracts the clientele I choose to be in business with.  True  False

### Team leaders evaluated by CEO

PRACTICAL PRESENTATION week 1: \_\_\_\_\_

PRACTICAL PRESENTATION week 2: \_\_\_\_\_

PRACTICAL PRESENTATION week 3: \_\_\_\_\_

PRACTICAL PRESENTATION week 4: \_\_\_\_\_

Certification Complete \_\_\_\_\_

The following is part of the salon PROCEDURE certification.

# Procedures, Esthetics

The sample page booklet contains the working templates used to modify for your salon certification process. Just a reminder that any changes made to the Business Structure Manual will need to be certified accordingly.

## Pedicures

Bring client into room, have them sit on the bed and remove their footwear.

Cleanse your hands in front of client. (Step 7 of the SOS)

Spray feet with disinfectant, remove polish and perform the consult analysis. (Step 3 of the SOS)

Apply cuticle crème and move them over to the chair to soak. Pedi bath is lined with a plastic bag.

While client is soaking, have them cleanse their hands with the Isagel, give client some One Minute Manicure and explain how to use. Have them rinse in a bowl. Proceed with a 90 second hand massage (Step 3 of the SOS).

Remove feet from soaking and wrap them.

Disinfect tools in front of client (Step 7 of the SOS).

Do cuticle work and shape toe nails.

Exfoliate feet and do 2 minute massage.

Perform mask or paraffin if applicable.

Clean off nail bed and apply polish. Educate client on the home maintenance tips (Step 8 of the SOS.)

Educate clients on the future service maintenance (Step 8 of the SOS).

Close the visit (Step 11 of the SOS).

Give client slippers to wear and bring them to a dryer chair to dry. Bring them a magazine and beverage. Let them know where to leave slippers and how long to wait before putting shoes on.

PRACTICAL TEST 1: \_\_\_\_\_

PRACTICAL TEST 2: \_\_\_\_\_

PRACTICAL TEST 3: \_\_\_\_\_

Certification complete \_\_\_\_\_

This is the salon's expectation of a peak performer and how they are expected to grow in the business as a technician that is continually increasing service and retail sales, productivity hours and a client base.

## Qualification Process

Note: The following is based on salary or hourly employees. The qualification process may also be used for commission paid employees. This is the process used to set parameters needed to secure employment and employment advancement opportunities.

Goal: Define the qualities of peak performers and encourage superior service. (See SOS workbook for percentile calculations.)

### Skill Certification Education

Skill certification education begins immediately upon employment. This education involves technical skills, product knowledge and the incorporation of the S.O.S. This prepares technicians for the qualification process.

### Qualification Process

This is the process that qualifies technicians for the team incentive program. Apprentices and new hires are to reach a "B" status within the first year of employment and level "A" status six months thereafter. Technicians whose starting pay recognizes previous years of experience are required to reach level "B" after six months of employment and level "A" six months thereafter. The goal of employees is to achieve an "A" status. Status is to be reached for three consecutive months in order to advance.

### Qualification Process for Probation Employees

Must have completed the written certification with a score of 90%

Must have completed skill certification with their own models and a score of 100%

Must be getting referrals from salon clientele

Must be converting clients into new services

Must be pre scheduling clients

Must be gaining productivity by 10% a month

Must be retaining 40% of new clients monthly

Must be retailing to a minimum of 10% of clients

## Qualification Process continued...

### Employee status “C”

Standard of Service to be at 85%. (page 8)

New client retention is at 50%.

Existing client retention is at 70%.

To be recruiting 6 new clients by “My Own Networking” and referrals monthly.

Making \$30/ hr in salon.

Minimum of 20% of clients buying retail consistently.

### Employee status “B”

Standard of Service to be at 100%.

New client retention is at 65%.

Existing client retention is at 80%.

To be recruiting 3 new clients by “My Own Networking” and referrals monthly.

Making \$50/hr in salon.

Minimum of 30% of clients buying retail consistently.

### Employee status “A”

Standard of Service is at 100%.

New client retention is at 80%.

Existing client retention is at 90%.

Making \$60/hr in salon.

Minimum of 40% of clients buying retail consistently.

Calculations for the above can be found in the workbook. Templates for monitoring can be found in the Performance Measurement Manual

# Salary Contract

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Salary of: \_\_\_\_\_

Renewal Date: \_\_\_\_\_

Service Goal to be met for contract renewal: \_\_\_\_\_

Retail Goal to be met for contract renewal: \_\_\_\_\_

Please check off the following:

I have received a copy of the Business Structure Manual applicable to my position.

I Have received a complete overview of employment structure with (company name)

I understand and accept employment with this company as presented in the Business Structure Manual.

Employee: \_\_\_\_\_

Employer: \_\_\_\_\_

This is how data is collected from the clients for the following employee tracking tools.

# Client Comment Card

Use this tool in the repeat client checkout for the purpose of monthly success reports.

**Please check all that apply.**

- Did the receptionist stand and say “welcome to Our Salon” when you entered the salon?
- Did your technician make reference to your facial features when choosing your style today? (hair clients only)
- Did your service provider educate you on the benefits your service will provide for you today?
- Were you asked about the products you are currently using at home?
- Did your technician explain the benefits of the products being used in your service today?
- Did you see your technician cleaning or taking new tools for your service?
- Were you given tips on how to maintain your service at home?
- Were you informed of new trends, new products or a new service idea today?
- Did your technician recommend a time frame in which you should reschedule your next appointment to maintain your service?
- Was the salon clean and tidy?
- Did the receptionist give you coupon cards and a sample at checkout?
- Was the telephone reception efficient and courteous?
- You would definitely recommend Our Salon to your friends.

Your Name \_\_\_\_\_

Technician Name \_\_\_\_\_

E-mail Address \_\_\_\_\_

**Thank you for your time!!**

This is how you track employee performance on a monthly basis. It implements the Standard of Service (page 8) expectations and Qualification expectations (page 10)

# Success Reports

Use the following when reviewing the month's performance. These can be used at staff meetings.

Technician Success Report for: \_\_\_\_\_

For the month of: \_\_\_\_\_

## Salary Goals:

Service/day \_\_\_\_\_ Goal \_\_\_\_\_

Retail/day \_\_\_\_\_ Goal \_\_\_\_\_

# of clients seen \_\_\_\_\_ Goal \_\_\_\_\_

## Employee Status Report:

Current status \_\_\_\_\_ Goal \_\_\_\_\_

Standard of service \_\_\_\_\_ Goal 100%

New client retention \_\_\_\_\_ Goal \_\_\_\_\_

Existing retention \_\_\_\_\_ Goal \_\_\_\_\_

Productivity level \_\_\_\_\_ Goal \_\_\_\_\_

Hourly salon rate \_\_\_\_\_ Goal \_\_\_\_\_

% of clients buying retail \_\_\_\_\_ Goal \_\_\_\_\_

Referrals & MON \_\_\_\_\_ Goal \_\_\_\_\_

Add on sales \_\_\_\_\_ Goal \_\_\_\_\_

If goals are not met the employee and employer create an action plan using the tools in the Business Structure Manual to reach goal attainment.

## Action Steps:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Time Frame: \_\_\_\_\_



This is how you track employee performance on a semi or annual basis. It implements the Standard of Service expectations and Qualification expectations. This is the tool used to dictate salary increases.

# Performance Appraisal (Technicians)

For: \_\_\_\_\_ Date: \_\_\_\_\_ Rate: \_\_\_\_ out of 38

**Sales:** \_\_\_\_\_ out of 4

- Retail goals
- Service goals
- Referrals
- Retention

**Standard of Service:** \_\_\_\_\_ out of 10

- Greeting
- Analysis Consults
- Massage
- Tool sanitization
- Current Product Analysis
- Home maintenance tips
- Industry trend Options
- Informing clients of SOS
- Product Recommendation
- Pre booking

**Marketing:** \_\_\_\_\_ out of 4

- Selling Policy
- Distribution of Business Cards
- Cross Promote with team
- Up Selling to fill Appointment Book

**Attendance:** \_\_\_\_\_ out of 4

- Arrive Prior to Shift
- No Sick Days
- Mentally and Emotionally Present
- No Late Arrivals

**Policies and Procedures:** \_\_\_\_\_ out of 9

- Front Desk
- Clean Work Area Weekly
- Clean Work Area Daily
- Dress
- Salon Daily Duties
- Salon Weekly Duties
- Client Complaint
- Greeting
- Telephone

**Technical Abilities:** \_\_\_\_\_ out of 2

- Advancement of Skill Sets or ABC status
- Advancement of Technical Skill

**Corporate Culture:** \_\_\_\_\_ out of 3

- Teamwork Policy
- Attitude Policy
- Staff Meeting Attendance

**Growth and Development:** \_\_\_\_\_ out of 2

- Service Commitment, Vision
- Salon Mission

Employee \_\_\_\_\_ Employer \_\_\_\_\_

Sample