**Client Name Here**

Month, XX, 20XX

Number of Locations:

# **Building your team**

Use this worksheet to draft your team and start thinking about your in-store / online customer experience. Be sure to share with your PERQ CSM when you are done!

1. **Potential Buy-In Obstacles:** Getting everyone on the same page will be a key to success!

List the key points of hesitation you believe ownership/executives and the team may have with a new digital sales program:

1. **Pick Your Champion of Digital Sales:**  This person is committed to your vision and will drive your team to see it through.

**Name:   
Current Title:**

**Store Location:**

*How will you hold them accountable?*

1. **Structure:** We understand that there is no “one-size-fits-all” for how you structure your team. Here are some options on how to handle Leads/Digital Ups (Check one box):

* 1 person does it all? (Only use this if your 1-location brand has 4 or less people!)
* Digital Ups Specialists evenly distributed at each store location.
* Other (Explain):

1. **Pick your Digital Success Team:** Teamwork makes the dream work! Who is in your starting line-up?

**Lead Specialist(s):** This person will be in charge of assigning all PERQ leads that come into the CRM. They may have this singular duty, or they can also have a dual role as a Digital Ups Specialist. We recommend one per rooftop, or a centralized person that does it for all locations.

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

**Digital Ups Specialist(s):** Those that have product knowledge and the ability to sell.  Need to be comfortable using technology, texting, and willing to be on the phone. Must be willing to follow a process.

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

**Name:**

**Current Title:**

**Store Location:**

*How will you hold them accountable?*