



New Client Set-Up
April 27, 2015



RDD Associate Learning Academy

Enterprise-wide Training, Education & Associate-development

Enterprise Sustainability - Laser focus on *GROWING OUR BUSINESSES...*
train, develop & reward *VALUED ASSOCIATE RESOURCES...* build momentum to ensure
FUTURE ENTERPRISE SUCCESS!


What is RDD's **ASSOCIATE LEARNING ACADEMY?**

An enterprise-wide training, education & associate -development process, that:

- For every RDD position, identifies core skills, business processes / protocols, technology enablers and best business practices / solutions critical to delivering *sales agency SERVICE EXCELLENCE*
- Provides a comprehensive portfolio of fundamental and advanced training/education modules *facilitating associate development and building organizational capacity and performance*

NEW CLIENT SET UP

Key Discussion Topics

- Course Overview: Necessary Data required to successfully achieve a Smooth  ing setup.

- RDD NEW Client Basics 101
 - The Process

- Principal Information forms
- Case Study Example

- Test YOUR Knowledge
- Next Steps

“It’s All About...”

THE BASICS

And

Getting it Right the First Time

“It’s All About....”

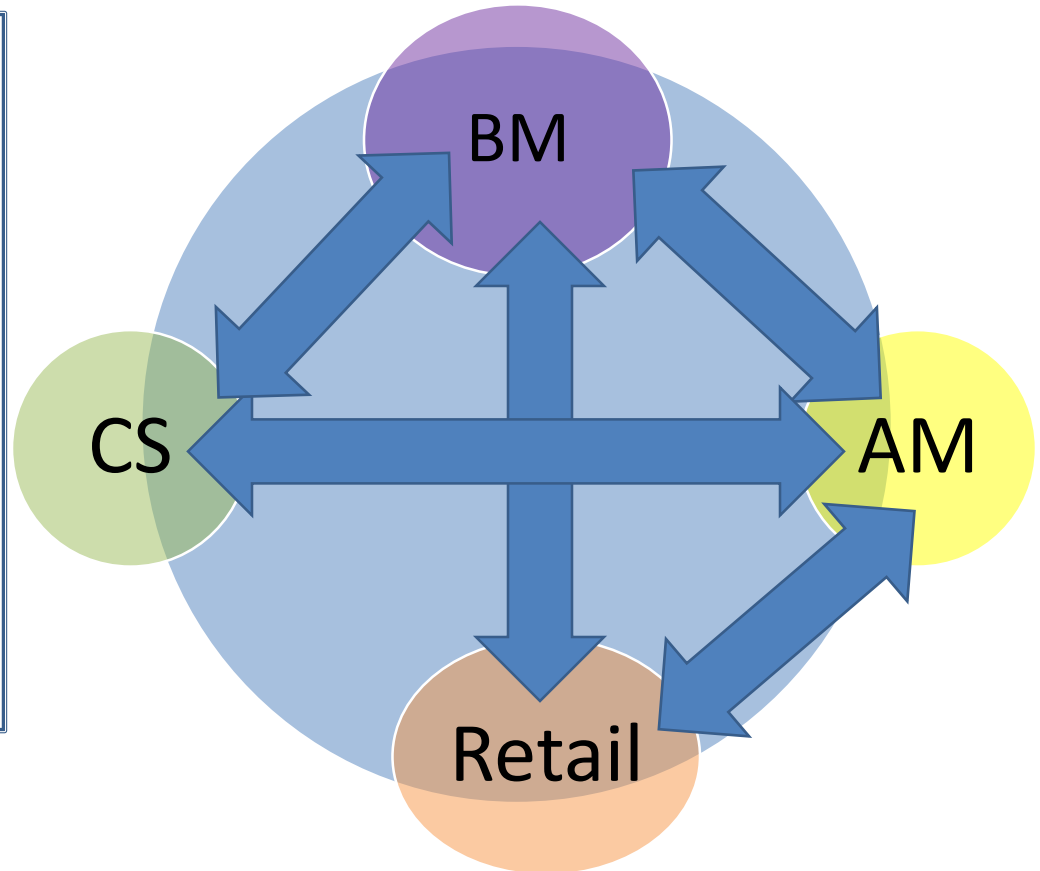
THE INFORMATION



Learning Academy

***Business Manager Provides:
Basic Information:***

***Authorizations
Current Promotions
Product List, Product
Code #'s, UPC
Dimensions, Pallet info
Code Life, Kosher,
JPEGs***



“It’s All About...”

THE INFORMATION



**Did you know RDD has a
New Principle
Set Up Form?**

“It’s All About...” THE INFORMATION



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NEW PRINCIPAL FORM

RDD Business Manager:

Start Date:

Principal Name & Representative :

Address:

Phone #

Cell #

Fax #

Principal's CS Contact

Dun's #

Phone #

Fax #

How are orders being placed: RDD transmitting via EDI or RDD receiving orders via carbon from client (See separate EDI information after class)

Commission Rate:

**Item Description - Item #, UPC Codes/ GTN #'s, Case Dimensions, Pallet – Tix Hi, Lead Times, Minimum Order quantities, Shipping location
*****Case Cost and any Allowances ie OI or BB**

RDD Associate Learning Academy

Expanding Skills – Leveraging Thought Leadership – Sharing Best Practices – Building Performance

“It’s All About...” *THE CASE STUDY EXAMPLE*



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NEW PRINCIPAL FORM

RDD Business Manager:	Debbie Kultzow
Start Date:	July 7, 2014
Principal Name & Representative:	Dairyfoods USA/Anthony Colson
Address	2819 County Road F* Blue Mounds, WI 53517
Phone	608-437-5598
Cell #	608- 345-1521
Fax #	Not applicable
Principal's CS Contact	Casandra Doescher
Dun's #	OOPS don't have
Phone #	(608) 437-5598 ext2330
Fax #	(608) 437-5644
How are orders being placed:	RDD receiving orders via carbon
Commission Rate:	5%

**Item Description - Item #, UPC Codes/ GTN #'s, Case Dimensions, Pallet – Tix Hi,
Lead Times, Minimum Order quantities, Shipping location**

Case Cost and Allowances **SEE ATTACHED**

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"It's All About..." THE CASE STUDY EXAMPLE



Retail Product List

February 17, 2014

Item #	Item UPC	Case UPC	Case GTIN	Description	Units/ Case	Gross Wt in LBS	Case Size (LxWxH) in Inches	Case Cub e	Cs/La yer	Layers /Pat	Cs/Pa llet	Pallet Wgt
DISPLAY SHIPPERS												
6-.67oz/4.02 oz Sonoma Jacks Gourmet Cheese Wedge Display Shipper: Case Cost \$108.00												
011880			100 44529 11880 5	Original (18), Garlic & Herb (18), Pepper Jack (12), Light Garlic & Herb (12), Light Pepper Jack (12)	72 Wheels	24.75	19x15.063x6.938	1.14	6	6	36	941
011881			100 44529 11881 3	garlic & Herb (30), Original (18), Pepper Jack (24)	72 Wheels	24.75	19x15.063x6.938	1.14	6	6	36	941
6oz Cheese Festival Cheese Dips Display Shipper												
014399			100 4452914399 2	Cheddar (16), Jalapeno (16), & Nacho (16)	48	24.5	20x15.5x7.625	1.36	6	9	54	1373
8oz Glacier Ridge Farms Cheese Spreads Display Shipper												
014427			100 4452914427 9	Aged Cheddar (16), Jalapeno Cheddar (16) & Smoked Gouda (16)	48	30.55	20 x 15.5 x 7.625	1.36	6	9	54	1700
014437		0 4452914437 1	100 4452914437 8	Aged Cheddar (12), Cheddar Bacon (12), Jalapeno (12) & Smoked Gouda (12)	48	30.55	20 x 15.5 x 7.625	1.36	6	9	54	1700
Unit dimensions:												
				Lead Time 21 days								
Sonoma Jacks - 4.25" dia. x 1/2"				Manufactured with 365 days.								
GRF cups - 4.5" dia. X 1.5"				Warehouse minimum 180 days								

RDD Associate Learning Academy

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“It’s All About...”

New Client Set Up



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What 3 important items are missing from this example:

“It’s All About...”

THE CASE STUDY Quiz



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“It’s All About...” THE CASE STUDY ANSWER



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Getting this Right the 1st time avoids all those NASTY deductions

RDD Associate Learning Academy

Expanding Skills – Leveraging Thought Leadership – Sharing Best Practices – Building Performance

“It’s All About...”

Next Steps



*Learning
Academy*

***No Homework Assignment
But take a New Principle Form as a
parting gift***