VIPER TRAINING CHECKLIST

Overview of Viper Components

Before you become a Viper customer, you will most likely have seen a demonstration of the basic features of Viper.
Those include:

- ❏ Proposal Dashboard
- ❏ CRM, Clients, Vendors, Hotels
- ❏ Content Library
- ❏ Programs
- ❏ Building a Client Proposal
- ❏ Client & Internal Costings
- ❏ Reporting

Data Load & Deployment of your Site

These are the steps required for Viper to upload and brand your Viper site. The process typically takes 2-4 weeks and the cost is included in your setup fee of Viper and requires several documents to be completed.
Those include:

- ❏ Branding: require your logo, fonts, colors and background image (for client site). *Background photos should be at least 1440px x 900px.* If you do not have a branding guideline, we can use the information from your website.
- ❏ Sample proposals: send us samples of your best proposals you use now for brand samples.
- ❏ Clients Accounts & Client Contacts: Upload your client contacts and client accounts using this template - Download Template
- ❏ Vendors: Upload your vendors and vendor contacts using this template - Download Template
- ❏ Hotels: Upload your hotels and hotel contacts using this template- Download Template
- ❏ Pricing: Add your product pricing to the provided Pricing Worksheet and upload the completed worksheet. Download Template
- ❏ Proposal Content: Send us your proposal content (copy & images) in either excel or word format for data upload. These can be individual files labelled by; activity, venue, restaurant or a complete file
- ❏ Schedule 3 training webinars with Viper

VIPER TRAINING CHECKLIST cont'd

Settings & Configurations Checklist

You will need to be familiar with the 4 different Viper sites you will use for your company as well as review and adjust the initial default configurations and adjust as needed for your company.
Here is the checklist:

- ❑ **Viper Admin Site - (companyname)admin.viperdmc.com.** Manages internal users & permissions, default settings for taxes, margins, currency, company information. Designate employees who will have admin access.
    - ❑ Single or Multiple offices
    - ❑ Edit Office Information - phone, website, logo
    - ❑ Currencies - if using multiple currencies, enter conversion rates
    - ❑ Address - enter company addres
    - ❑ General tab - default margin/markup and default client message (both can be overridden)
    - ❑ Tax Rates - enter all tax rates that you might use
    - ❑ Costing Controls tab - configure which columns you and your clients will see
    - ❑ Employees - add employee information and permissions and add images
    - ❑ Define which employees can access the admin site
    - ❑ Review Site Settings taba
    - ❑ Customizable terms such as role descriptions and program statuses.
    - ❑ Bookmark this site

- ❑ **Viper Internal Site - (companyname).viperdmc.com.** Contains all of your proposals and costings.
    - ❑ Destinations - add destinations and regions that make sense for your costings.
    - ❑ Review data upload for vendors, hotels and content
    - ❑ Review styling for headers and text
    - ❑ Bookmark this site

- ❑ **Viper CRM Site - (companyname)crm.viperdmc.com.** Used to manage your clients, client contacts and opportunities.
    - ❑ Review data upload for clients
    - ❑ Start a new lead to ensure it displays on your Viper Internal site dashboard

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- ❏ **Viper Client Site - (companyname)client.viperdmc.com.** These are the individual web links where your clients will view their proposals. The link can be found within the client proposal tab.
  - ❏ Review branding

Content Library - Tariff Basics

Content Library is where your proposal content and all costing lives; it is the backbone of making exceptional proposal content that is profitable. While you may build content or costing 'on the fly' in a proposal, if you plan to reuse the content, it is worth your time to build it in the library.

Basic Checklist:

- ❏ **Review or Build Categories**
  - ❏ Categories by destination & groups that make sense for your costing. If a price is specific to one location, you will need separate categories. If a price is generic to all location, it can be a top level category.
  - ❏ Example: Transportation costs would be specific costing for each location. Gift amenities might be same cost for all locations and would be a top level category.
  - ❏ Note: you can move your data around as you go along, so keep it as organized as it makes sense to how you sell.
  - ❏ Add a templates category - so your team is building the same look of content based on your branding.
  - ❏ Add a company info category - to store your company branding articles.

- ❏ **Build a product**
  - ❏ A product is a single item (single box), typically without an article (photo) to go with it. An example would be a 5 hour bus charter which is a single item that may be used in many costing bundles - activity, dine around. A single product with an article is rare as most products (ATV ride) requires multiple products to cost – ATV ride, collision insurance, transportation, staff.
  - ❏ Does it have a specific location? A global product may be bottled water, but a 5 hour bus charter may need a location as the price is different from one destination to another.
  - ❏ Add a capacity for each product. In the example shown, how many people on a bus (50?). If you do that, when you add 300 guests to a program, it will give you 6 busses, instead of 300. Another example is a Jazz Trio – say it's capacity is 300, you will only get one trio per event.
  - ❏ When costing, decide how far you want to break these down. Is it worth it add products for: linen, candles, centerpiece, menus or do you want one product called 'Dining Table Decor w/linen, centerpiece, votives' and combine the price

and make a note for the pieces. Keeping it simple will help customers navigate your proposal costing.

- ❑ Use unit measure - per person, per event, per trip.
- ❑ Use price schedule - when you get a price for next season, enter it with a start date which Viper will pick up from your program dates.
- ❑ Add a date to the notes section – 2019 rate for blah blah program. It's a way at a glance to see that your costing is updated or stale.
- ❑ Add a provider if possible, so you can track who delivers what. It also helps for yearly pricing updates to do them by provider. If you have several providers for one product, move the default provider to the top.
- ❑ Build a placeholder product with a placeholder price - these are handy to have when building 'on the fly' in a proposal. Add to templates category - no provider, no capacity, just a blank costing product.

❑ **Build a Bundle**

- ❑ A product is a single item (single box), typically without an article (photo) to go with it. An example would be a 5 hour bus charter which is a single item that may be used in many costing bundles - activity, dine around. A single product with an article is rare as most products (ATV ride) requires multiple products to cost – ATV ride, collision insurance, transportation, staff.
- ❑ Build a new bundle and add several products to it
- ❑ Order products how you want them to view in a proposal - decor, talent, busses, staff
- ❑ Build placeholder costing bundles - for 'on the fly' content
- ❑ Build template costing bundles - such as activities where generic costs such as transportation and staff would be the same

❑ **Build an Article**

- ❑ An Article can be freestanding (a word document, maybe about your company), or it can be layered on top of a costing bundle (to describe an activity).
- ❑ Build an article with no costing about your company
- ❑ Build an article on top of costing bundle
- ❑ Use the content blocks to add text, pictures, video, galleries, and slide show

❑ **Build Proposal Content**

- ❑ Bundle some costs together > example: airport arrival vehicles, staff, porterage
- ❑ Add an article to bundle > H1 header, photo (large), content
- ❑ Add a photo gallery or slide show
- ❑ Add a video
- ❑ Copy a bundle
- ❑ Copy and article

- ❑ Note: There are typically 2 schools of thought around proposal content - some users like to build content in smaller batches - venue, decor, talent would be 3 separate bundles & articles and could be mixed and matched when adding to proposals. Other clients like to build large content blocks of events and delete the components they don't want once it is in a proposal. Both methods work, so just use what works for you. Remember, any content library changes when building a proposal will automatically update in your proposal, so this is the BEST method to keep your content library up to date. Changes made within a proposal can be saved back to content library, but it is not best practices and we suggest updating within a proposal with client specific content only.

- ❑ **Content Library Rules of Thumb for Success:**
  - ❑ File items by category and sub-category
  - ❑ Keep pricing as simple as you can for clients and yourself
  - ❑ Use placeholders and templates so you can build on the fly when necessary
  - ❑ Use templates so your proposals follow a style guideline
  - ❑ When pasting from word documents to viper, use the clear format function
  - ❑ Use notes, providers, comments so the next person knows your logic
  - ❑ Keep as many prices generic as possible to allow proposal builders access to as much content as possible
  - ❑ Build great branding (company, destination) content to use in templates to start proposals with
  - ❑ Costing has many more features such as inclusions, but this is a good start.

Starting Lead in CRM

- ❑ Start a lead in the CRM
  - ❑ Account
  - ❑ Client (need a valid email address to send proposal)
  - ❑ Estimated value
  - ❑ Destination (to access destination specific content)
  - ❑ Probability
  - ❑ Hotel (if known)
  - ❑ Sales Person
  - ❑ Dates (if known)
  - ❑ Completed - this lead will now come across to your Viper (content) dashboard

Building a Proposal

VIPER TRAINING CHECKLIST cont'd

- ❏ Copy a template or skip for new
  - ❏ Using a branding template with a few articles can be a time saver
  - ❏ You can copy an existing program, but remember the costings will not be updated from your content library
- ❏ Enter Details
  - ❏ Program Name
  - ❏ Primary Client Contact
  - ❏ Dates
  - ❏ Destinations
  - ❏ Size
  - ❏ Profile
  - ❏ Description
  - ❏ Probability (for your reporting)
  - ❏ Estimated Value (can be added after costing)
  - ❏ Rebate or Commission (if applicable)
  - ❏ Submit
- ❏ Event Schedule
  - ❏ If it has a COST associated with it, it must be entered in the event schedule. An example would be 'Program Management'.
  - ❏ Add notes into the events if applicable
- ❏ Proposal
  - ❏ Add client logo
  - ❏ Review Table of Contents and re-order if required
  - ❏ Add any Articles (no cost) items if applicable. Example: Emergency Procedures
  - ❏ Populate each Item with content from your library. Some items may require multiple blocks of content - example: Optional Tours
  - ❏ Build custom content if required (ideally in content library for future use) and then add to Proposal
  - ❏ Add custom content & articles to personalize for this specific client
- ❏ Costing
  - ❏ Add quantity of guests to each section
  - ❏ Adjust costings, add costings, review margins
  - ❏ Bundle costs if applicable - often used for activities if you want an estimated price per person
  - ❏ Hide costs if applicable
  - ❏ Exclude costs from total if applicable
  - ❏ Review commission, management fee if applicable
  - ❏ SAVE a version when costing complete and note that version will be sent to client
- ❏ Providers

    - ❏ Assign providers if needed
    - ❏ Place holds if needed
- ❏ Client
    - ❏ Publish Proposal
    - ❏ Publish Costing (if applicable) - remember, the client can download the costing with only a timestamp, so it is critical to save a version of the costing if you are going to continue to work on the active version
    - ❏ Print Friendly View - for clients who want to view in word
    - ❏ Message to Client entered
    - ❏ Preview this Proposal - client view
    - ❏ Attachments - clients can access these attachments. Example: menu's, floor plans
    - ❏ Send from Viper - recommended
    - ❏ Send from your Email - backup option
- ❏ Analytics
- ❏ Documents
    - ❏ Contract will be generated from here
- ❏ Payments
    - ❏ will be populated here for client and providers
- ❏ P&L
    - ❏ Will populate from costing and payments
- ❏ Files
    - ❏ Internal documents can be stored here
- ❏ Status
    - ❏ Change status from new or draft to denote it has been sent to client

Proposal Sales Process

- ❏ Revisions
    - ❏ Unpublish proposal from client
    - ❏ SAVE a version before working on changes - you can revert back if needed
    - ❏ SAVE changes
    - ❏ Republish when updated
    - ❏ Resend to client with updated client message
    - ❏ Revise status if applicable
    - ❏ Add a note for new status
- ❏ Dead
    - ❏ Unpublish and change status to dead to remove from your dashboard and default reporting

VIPER TRAINING CHECKLIST cont'd

- ❑ Contract
    - ❑ Generate Contract from Billing tab
        - ❑ Adjust payment schedule if required
        - ❑ Attach current costing if applicable
    - ❑ Change status to 'Contract Due'
    - ❑ Contract Received
        - ❑ Change status
        - ❑ Unpublish and save version
        - ❑ Enter operations mode

Viper Reporting from Dashboard

- ❑ Filter data by all programs by:
    - ❑ Date
    - ❑ Destination
    - ❑ Salesperson
    - ❑ Status
    - ❑ Probability
- ❑ Decide how you want to manage your pipeline reporting. Examples include:
    - ❑ Using estimated value & keeping that up to date
    - ❑ Keeping probability updated and reporting on the active costing values
    - ❑ Flipping sold programs to operations (100%) and using that value as sold
    - ❑ Using a status (needs analysis) to report active value of pipeline
    - ❑ Training staff to exclude costs for multiple options in the costing to keep pipeline costs 'real' and not overinflated
- ❑ Review HQ reports which works on sales costing value + ops costing value combined (tax in)
- ❑ Download data to excel