Southeast Petro Distributors, Inc.

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Cocoa, FL 32926

Customer Service Representative (CSR) Training Manual



As Sunshine Express Store Managers, we have a duty and a responsibility to train our employees from the time they are hired, until they are no longer under our management.

Always remember the Sunshine Express vision when it comes to our employees and how we lead them:

“Affirm people for who they are, what they believe, and what they aspire to become.”

We should be intentional in cultivating impactful leaders that can grow with us.

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# Introduction

The first day that a new hire begins, the Store Manager will need to ensure that they are properly trained and ready to service the store on their own. This training manual is an outline in how you, as a Store Manager, should guide your newly hired employees in regards to the convenience store and gas business. It is the policy of Southeast Petro and Sunshine Express Stores that every new employee completes a minimum of 20 hours of training before they are allowed to work independently.

It is imperative that this manual and the new hire packet are utilized for every new hire. The items you should find in your new hire packet are as follows:

1. **CSR Initial Training Checklist and Branded Training Log**

The checklist outlines the trainings that must be completed before a new hire is allowed to work independently. In order for the checklist to be complete, the manager and the employee will need to sign off on the trainings completed, verifying that they have been completed in their entirety and that the employee understands the training that was provided. The branded training log is a more in depth log that documents that each module required has been completed.

1. **Southeast Petro Welcome Packet**This includes New Hire Forms, two to three (depends on part time/full time) initial uniforms, a name tag and a complementary mug for drinks during working hours.
2. **Employee Handbook**The Employee Handbook should be reviewed in depth with both the Store Manager and the New Hire so that questions are answered immediately.
3. **Convenience Store Safety and Responsibility (CSSR) Workbook**

All Sunshine Express Stores should have the main Red Book, which contains the training manual and CD to conduct this training. Once an employee completes the workbook, the Store Manager then signs off on the training.

1. **Hurricane Preparedness Guide**

An overview of what to do at the C-Store in the event of a bad storm.

1. **CSR Register Operation Guide**

This guide will take the CSR through the basics of operating the register.

Please note that all online trainings are linked on the Southeast Petro Employee Portal at [www.southeastpetro.com](http://www.southeastpetro.com) under Resources > Employee Resources > C-Store Training > New Hires

# First Day Orientation

The new hire’s first 8 hours of employment will consist of the following training schedule:

1. Welcome to Sunshine Express Stores
2. Employee Handbook
3. Class C Operator Training
4. We Card
5. Convenience Store Safety and Responsibility (Red Book)
6. Slip and Fall Training
7. Sexual Harassment
8. Branded Training

## Welcome to Sunshine Express Stores

Think about your first day at work. Were you invited in as part of the team? Shown around the building to locate where everything that you would need was placed?

When bringing on a new hire, it is our job to make them feel welcomed, appreciated, and most importantly, make them feel a part of the Sunshine Express Team. You are now a mentor to this new employee; and whether they stay with the company long term, or move on to work somewhere else, you have the task of molding this person into the kind of worker any manager would be proud to have on their team. The amount of time that you invest in this new employee will be the determining factor as to how successful they are in the company.

### Welcome Packet

All new hires should be equipped for success on their first day. Two branded uniform shirts for part time and three shirts for full time, a name tag, and a drink cup will be supplied to every new hire.

The drink cup is something that they will need to use for drinks during their working shifts. This is an alternative to using the store’s cups which can be costly over time.

Be sure that you request uniforms and name tags before the employee starts their first day on the job.

### Initial Paperwork

All initial paperwork will be supplied in the new hire packet. However, if there is an issue and you need access to the new hire forms, they are available on the Southeast Petro website [www.southeastpetro.com](http://www.southeastpetro.com) under the Resources tab > Employee Resources > Store Manager > HR Forms.

The new hire packet needs to be completed in its entirety, including the W-4, I-9, and Direct Deposit.

###  Showing the New Employee Around

The last part of the welcoming period is to give the employee a tour of the station. Show them where they can place their valuables, where the bathrooms are, and anything that the employee should know on their first day of getting familiar with their new job. Don’t forget to introduce them to everyone on staff.

## Employee Handbook

The employee handbook is self-explanatory. It is important that as the Store Manager, you review this book together so that any important questions may be answered at that time. Some important points to go over, which are also on the CSR Initial Training Checklist, are:

1. Employee Schedules – where they are posted and when
2. Important Contacts
3. Dress Code
4. Parking
5. Lunch/Breaks
6. Designated Smoking Areas
7. Cell phones

## Class C Operator Training

Class C Operator Training should be requested before the new hire’s first day. Store Managers will need to notify the Environmental Department, at Southeast Petro Corporate Office, by email, in order to have the new employee set up. An e-mail will be sent with the link to take the course. Be sure to print the certificate as proof of completion and e-mail a copy to the HR Manager with the completed training packet.

## We Card

This training is completed online. Go to <https://learningcenter.wecard.com/> and select the Employee Training. Be sure to print any certificates that show proof of completion and e-mail a copy to the HR Manager with the completed training packet.

## Convenience Store Safety and Responsibility Training (CSSR)

This training is also referred to as the “Red Book Training”. The materials are stored in the Red Book in case of inspection by the state. The Red Book includes the training CD, in which the employee must watch and complete the training work book, in order to receive credit. If the CD is misplaced, the video can also be accessed online at the following link: <http://www.fpma.org/index.php/education/convenience-store-saftey-and-responsibility-3-0>

As the Store Manager, you will need to verify that the answers are correct, and then sign off on the training as complete.

## Slip and Fall Training

Slip and fall training is a simple YouTube video. It is a short 5 minute video that can be accessed at the following link <https://www.youtube.com/watch?v=9P5zZuR1QXA>

## Sexual Harassment

The Sexual Harassment Training is a PowerPoint that the new hire will need to go review and sign off that they understand the information. This is linked on the Southeast Petro Website [www.southeastpetro.com](http://www.southeastpetro.com) under the Resources tab > Employee Resources > C-Store Training > New Hires.

## Branded Training

There are some brands that have training modules, and there are some brands that do not. If your brand is one that does not have a current online training program, be sure to have them train on one of the brand’s that are available. It is not about the brand, but rather the expectations of a branded site that matters.

The new employee will need to register to take the store’s branded training by going to the Southeast Petro Website <http://southeastpetro.com/brand-training-portal/> and clicking on their corresponding brand. Be sure to log the training both on the Initial Training Checklist as well as the Branded Training Log.

# Hands On Training

Hands on training will be imperative to the success of the newly hired employee. This is where a thorough approach should be taken for the remaining 12 hours of training.

## Register Operation

Operating a register is one of the most fundamental skills the employee should learn when they are first hired. The CSR Register Operation Guide provided in the New Hire Packet is a strongly recommended guideline for the points that a manager should use when training on a register. All Store Managers may have different techniques or routes that they take to complete tasks on the register, and this guide may not encompass all that you want to teach your new hire.

### Verifone POS Operations Tutorial

Before your new hire hits one key on the register, they should watch this 15 minute video linked: <https://www.youtube.com/watch?v=a_egjykmJW4>

This will give a basic overview of the system that will save you time in explaining later.

### CSR Register Operation Guide

Use this guide provided in the New Hire Packet to take your new hire through all of the important aspects of register operation. It is recommended, when available, train using a register that is closed off of to customers. However, we understand that is not always available at every store. The new hire should go through the operation guide first, and then be monitored on the register handling customers for a minimum of 8 hours.

The CSR Register Operation Guide can also be accessed on the Southeast Petro Website [www.southeastpetro.com](http://www.southeastpetro.com) under the Resources tab > Employee Resources > C-Store Training > New Hires.

\*\*\*NOTE\*\*\* Emphasis on scanning every item is imperative. If something doesn’t scan, it needs to be notated and reported to the Price Book Administrator.

## Lottery

Lottery is the second most important aspect of initial training that a new hire must understand and complete. The new hire should know the difference between scratch off Lottery and online Lottery. There is a host training option on the online Lottery machine in which the Store Manager can enable and show the new employee, the online Lottery machine. This function is further explained in the CSR Register Operation Guide.

## Emergency Procedures

There are many emergency procedures that are outlined in the Sunshine Express Procedural book, however, it is important to walk new hires through the store and locate items such as the Red Box and Emergency Shut-Off Valves. Store Managers should also give examples and describe scenarios in which the Red Box and Emergency Shut-Off Valves would be utilized. Below is a list of points that new hires should be briefed on, which is also outlined on the CSR Initial Training Checklist.

1. Locate the Red Box
2. Locate Emergency Shut-Off Valves
3. Review Fuel Spill Policy
4. Review Safe Drop Policy and why it is important
5. Review the alarm system and how it works
	1. Make sure the employee knows their code, in case of an emergency and the alarm company calls
6. Review the Hurricane Preparedness Manual
7. Review Important Contacts

## Housekeeping Inside

This is meant as a basic guideline to identify employee’s cleaning responsibilities. Not all Store Managers use the same training techniques, and may have more that they want to cover. This list is not all encompassing, and Store Managers should use their own experience to train in these areas.

### Areas to Keep Clean

All Sunshine Express Stores have a cleaning checklist. Use the cleaning checklist as a guide to walk the new hire through the daily tasks that must be completed.

###  Equipment Operation

There are several pieces of equipment in the C-Store that the newly hired employee must learn to operate. This will vary greatly depending upon what is in the store and the daily operations required with that equipment. This area of training is completely up to the Store Manager based upon the equipment present. Each Store Manager should have a full list of equipment present in their store with a basic outline of how to operate each one. The Store Manager will need to show the new employee how to operate each one thoroughly.

#### Veeder Root

One piece of equipment that is mostly uniform throughout all Sunshine Express Stores is the Veeder Root Tank Gauge System. Newly hired employees should watch the following YouTube video that takes them through all functions of the Veeder Root:

<https://www.youtube.com/watch?v=f5XWei0Scac>

Once the video is viewed, the Store Manager should have the employee complete a few functions on the Veeder Root that the Store Manager feels relevant to the CSR position. Alarms should be emphasized that they are to be called in and reported immediately.

### Restocking Shelves and Coolers

Restocking shelves is an art, and time should be spent showing new hires the proper way to stock. This can also be a lesson in how to properly identify an out of place stock that customers may have moved throughout the day. Having a well-stocked store is essential in presentation for customers.

### Preventative Procedures and Log Books

All stores have preventative procedures that should be top priority in their daily activities. Training new employees on these processes is an important step in ingraining them into their daily routines. The following procedures should be reviewed and practiced with new hires during their training:

1. Vendor Logs
2. Skimming Prevention Procedures and Logs – Make sure that the skimming page is reviewed, the video viewed, and then the entire process is walked through with the employee.
	1. Show the following video in order for the new hire to understand what skimming is: <http://southeastpetro.com/skimming-and-fraud-preventative-practices/>
3. Manual Tank Stick Readings Procedure and Logs – New hires watch the “How to Manually Stick Tanks for Water” video and then the Store Manager shows the employee how to manually stick the tank.
	1. Watch the video of “How to Manually Stick Tanks” linked here: <https://www.youtube.com/watch?v=vfrvdPvERZM>

### Housekeeping Outside

This is meant as a basic guideline on the areas to cover with a new hire during their training. Not all Store Managers use the same training techniques, and may have more to cover. This list is not all encompassing, and Store Managers should use their own experience to train in the following areas of the forecourt:

1. Replacing receipt paper
2. Checking hoses for leaks
3. Checking screens on the pumps
4. Checking for skimming/tampering of seals
5. Authorized signage

### Opening/Mid Shift and Closing Procedures

Take an hour to review the procedures for each shift. Certain tasks should be done a certain way depending on the shift. Be sure to touch on all subjects outlined in the procedural handbooks such as lights on/off times, locking up, setting alarms, setting up/breaking down stations, etc.