Training for Success
New Training Curriculum for Professional Development

Drew Descourouez & James Wang
Customer defaults on payments have hindered VITALITE’s ability to take full advantage of its PAYGO platform, and to use this to scale its impact. To address this issue, we investigated agent training methods, observing 6 different trainings and interviewing 75 new and existing sales agents. We identified several gaps between company training strategy and field execution. Agents’ inability to retain information after initial agent trainings was a particular problem.

Providing better training opportunities and adjusting the current agent training methods can better convey VITALITE’s expectations of sales agents, train agents to recognize strong customers and sell more products, and lead to long-term learning opportunities for the agents to improve their business and well-being.

We recommend the implementation of a new training strategy to focus on improving information retention while increasing agent accountability. VITALITE can phase this in over a year long process with multiple training modules distributed by Sales & Service Representatives and the potential for short digital facilitated trainings created by the Training Team and the Video Team.

We provide an integrated document and working files that can be adjusted based on need. In the following documents, we present the initial onboarding training manual that serves as an introductory resource to ensure consistent trainings and a revised test to better reflect the material in the training. We also provide a set of documents that outline a potential schedule for future trainings, module ideas, a training roadmap, and other materials for the transition into this new training method.
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**Note:** There are 2 versions of this report. This is the integrated document for review and the other is a series of working documents that can be distributed and adjusted based on need.
Initial Onboarding to Maintain Ongoing Partnerships

The current initial training is long, dense, and unstructured. Taught by a charismatic training team member, each training is unique and tailored to the needs of the group, which can lead to less time spent on other information. This is mainly attributed to the amount of information that needs to be taught within a short time frame. To ensure that agents retain the material, the training team member may take additional time to ensure all agents comprehend one of the lessons, which sacrifices time that could be spent on learning an equally important lesson.

Moreover, the original manual associated with the training contains heavy blocks of text and provides too much information, especially regarding unnecessary technical specifications, in the hopes that the agent will refer to this manual for any questions in the future. This manual is also a study resource for the test given on the second day, but the complexity and mass of information make it difficult to serve as a study guide.

To create a more unified initial onboarding, we rewrote both the introductory training manual and the test. Rather than a heavy focus on the technical details of the solar home system, the manual focuses on rudimentary knowledge necessary for an agent to begin distributing to their communities. It also clearly outlines the opportunities and expectations of a partnership with VITALITE to inspire agents to become motivated and create a difference. This will encourage agents who are more driven and passionate, which in turn, will increase sales and ensure reliable customers. Adding graphics and simple text further increase accessibility for the agent. We also modified the test to better reflect the initial training and the manual, equally testing on all the topics discussed.

To account for the missing information that was removed, we decided to transition towards a new training strategy that distributes content over a schedule of subsequent training.

For more information, see Appendix A. Initial Training Manual and Appendix B. Initial Training Test.
A New Approach to the Same Goals: Training Strategy

Instead of only changing the onboarding training manual, we realized a long-term solution was necessary, which required transitioning the entire training strategy. The former training system required a refresher training every three months, but in some cases, the refresher training would not be until another year. Since VITALITE aims to train its sales agents to become entrepreneurs, it needed additional educational material to reach its goal.

Noticing the sheer amount of information was hard to process within the two-day onboarding, we proposed a staggered training strategy that would enable continuous learning. SSRs, who currently work with their own city or region’s sales agents, have an important role in providing these follow-up training modules. Since they contact and visit their agents every two weeks, they are in a prime position to carry out these trainings. This in turn, will increase an agent’s accountability, because the SSRs are playing a more active role in agent management.

Over time, after an agent gains more experience, they will also have better insight into what they can and would like to learn to become a better entrepreneur. Shifting to this method for training will lead to more qualified agents who are motivated to succeed. In turn, agents will choose reliable customers and improve their own lives and those living in their communities.

Through our research, we also experimented a little with digital facilitated training, or teaching through recorded videos. Although we only tested it on a few agents, it appears to be an effective way to transmit information, but more research is needed to determine the impact of this style of teaching. However, having an entire shift in the training method requires important supplemental material for a smooth transition. Besides a potential schedule (Appendix C) and a list of module ideas (Appendix D, E), it is also important for the training team to have a template to create these future modules (Appendix F).

For the agent, we developed a simpler customer logbook (Appendix G) to easily mark transactions, and PAYGO calendars (Appendix H) for both the 12-month plan and the 18-month plan, so the customer has a better visual representation of how close they are to owning the product. Finally, a customer manual (Appendix I) helps the agent better explain to the customer technical information regarding the basics of installing the solar panel and functions of the battery box.
INITIAL AGENT
TRAINING MANUAL

“Quality service through training”

Made in Partnership with VITALITE by the Miller Center for Social Entrepreneurship at Santa Clara University

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Tel. +260 976147432 I 955147432 I 967147432
www.vitalitegroup.com
COMPONENTS OF THE TRAINING MANUAL FOR THE TRAINING TEAM

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Expectations and Opportunities as a VITALITE Agent............................................................ - 2 -
Overview .................................................................................................................................. - 4 -
Solar Home System (SHS)......................................................................................................... - 5 -
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TRAINING OBJECTIVES

☐ Opportunities and Expectations as a VITALITE Agent

☐ Product Knowledge
  ☐ Solar Home Systems
  ☐ Agri-Solutions

☐ Paygee Interface
  ☐ Payment and Penalty Structure

☐ How to Sell
  ☐ Marketing and Sales Skills
  ☐ Commission

☐ Triple P Servicing
EXPECTATIONS AND OPPORTUNITIES AS A VITALITE AGENT

This is an opportunity for you to become an entrepreneur. This is an **investment in yourself**!

**Why are you here?**

- Improve your Business Skills
- Improve your Community
- To Make Fast Money
- We are excited to have you here and look forward to having you as a VITALITE agent
- Should you really be here?
  - STOP and Rethink.

Through this partnership, you are given a business opportunity. Please read the Agent Contract to understand our expectations. A brief outline is provided:

**Agent...**
- Services customers on PAYGO plan
- Sells VITALITE products and CAN NOT sell competitors’ product
- Identifies credit-worthy, quality customers through careful and thorough assessment
- Explains and ensures customer understands payment terms
- Is responsible for own Paygee account, equipment, and supplies
- Promotes positive brand image of VITALITE through actions

**VITALITE Provides...**
- Commissions based on sales
- Initial trainings to start partnership
- Marketing materials, assistance with sales events, and equipment for sales purposes
- Periodic performance reports
- Further educational trainings
- Agent Care phone number for support and guidance
Opportunities
As a VITALITE agent, you will be able to make money, have continual support from VITALITE, and empower your community:

**Make Money:**
It is easy to make money:
1. Sell quality products and services
2. Low capital to start a business
3. VITALITE support and consistent trainings

The more you sell and service, the more money you will make. What you earn is up to you!

**Support from VITALITE**
This partnership will give you:
1. Continuous learning and resources to increase profits
2. Personal and professional development
3. Access to a business network

You will gain what you put into this opportunity!

**Empower your Community**
Access to solar power will:
1. Save money on candles
2. Improve health
3. Help children study at night

This is an opportunity to improve the lives of people in your community and make Zambia a better place for the future generation!

Approach: How will YOU achieve this?

**ENTREPRENEUR**
- Sell products to make money, increase profit, and expand business
- Learn business skills to become more organized and successful

Do you want to grow your business?

**VITALITE PARTNER**
- In-person servicing and training at least once every 2 weeks
- Constant support through the Agent Care phone line

Who will you contact for help?

**PROBLEM SOLVER**
- Accelerate business transactions through payment calculations
- Troubleshoot and work with customers to solve problems

What challenges will you face?

**COMMUNITY LEADER**
- Offer affordable and accessible products that have a large impact
- Build trust within your community to continue improving their lives

Are you ready to serve your community?
OVERVIEW

Company Overview

VITALITE is a Zambian registered social enterprise created in 2013. Our mission is to offer affordable, accessible, high-quality products and services to underserved communities across Zambia. We aim to deliver a range of home energy solutions that meet the varied needs of all Zambians and Zambia’s electrification goals. More importantly, VITALITE creates access to technology for all Zambians.

Product Overview

<table>
<thead>
<tr>
<th>Solar Home System (SHS)</th>
<th>Cooking Solutions</th>
<th>Agricultural Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Solar Home System is a German-made product that is durable, providing reliable lighting and power using solar energy.</td>
<td>Ecozoom charcoal stoves use 70-80% less charcoal for the same cooking energy and promotes household hygiene by reducing kitchen ash.</td>
<td>Increased access to agricultural inputs and products to empower farmers with technology and information to improve practices</td>
</tr>
</tbody>
</table>

1. **PSHS7500**
   a. Powers up to 3 LED lamps and radio
   b. Basic Kit
2. **LSHS4500**
   a. 15.6-in TV and 3 LED lamps
   b. Small Entertain. Kit
3. **LSHS10500**
   a. 23.6-in TV and 4 LED lamps
   b. Large Entertain. Kit

1. **Mbaula Fresh**
   a. Saves up to 70% on charcoal use
   b. Lasts up to 5 years
   c. 1 Year Warranty
   d. 26 cm diameter
2. **Mbaula Jet**
   a. Saves up to 80% on charcoal use
   b. Lasts up to 5 years
   c. 2 Year Warranty
   d. 28 cm diameter
1. **Agricultural Inputs**
   a. Lay-by Card for
      i. Seeds
      ii. Fertilizers
      iii. Herbicides
      iv. Agro-chemicals
2. **SF1 Solar Irrigation Pumps**
   a. Increase yields and irrigation efficiency
   b. Water storage and drip irrigation up to 1200 sq. meters

**Add-on Products:**

Good-paying PAYGO customers can buy Add-On products such as smartphones and pay for them over a specified period of time.

**Agri-Innovations**

Through partnerships, VITALITE provides training videos about best farming practices. Farmers watch, discuss, revise, and apply the information learned to improve productivity and foster cooperation.
SOLAR HOME SYSTEM (SHS)

Problem: 60% of Zambians do not have access to reliable electricity, but in rural communities, this percentage is 96%. Electricity improves the quality of life.

Solution: A solar home system provides clean, reliable electricity that is free after completion of all payments. In the long-term, this quality product is cheaper than buying candles or torch batteries.

Value:
- Enable students to study at night and learn through listening to the radio
- Cheaper in the long-term than buying candles
- Lighting for all 3 LED lamps that lasts for 7-8 hours on a full battery
- Much simpler to install and maintain than a ZESCO system

How it Works: The solar panel charges the battery box during the daytime. At night, the battery box discharges electricity to power the LED lamps and charge phones.

<table>
<thead>
<tr>
<th>Part</th>
<th>Features</th>
<th>Image</th>
</tr>
</thead>
</table>
| Solar Panel (6 Watt)        | • Very durable with 5 m-long cable; charges battery box after 2 hours of direct sunlight  
                              | • **Clean two times every month**                                          |       |
| LED Lamps                   | • 2 100-lumen lamps, 1 200-lumen lamp  
                              | • **Lifespan: 27 years**                                                   |       |
|                            | • A **mounting kit** to attach 6 m-long cable                              |       |
| Battery Box (3.25 V/7.5 Ah) | • Controls the charge in the system  
                              | • Connects lamps and solar panel  
                              | • High-quality Lithium-ion battery  
                              | • **Lifespan: 7-10 years**                                                 |       |
| Remote Control              | • Turns the system on and off  
                              | • **Enter tokens** into the battery box                                   |       |
| Radio                       | • Multi-functional and use as speaker  
                              | • **USB slot**, memory card, SW/FM/AM radio  
                              | • **1-year Warranty**                                                     |       |

Warranty for PSHS 7500 (excluding radio): 3 Years
AGRI-SOLUTIONS

**Problem:** Smallholder farmers lack access to
- Agricultural Inputs: *Recycled commercial seeds lead to dwindled yields*
- Credit: *Loans from non-profit organizations exist, but are unsustainable*
- Information: *Farmers can learn techniques to improve yields*

**Solution:** Agri-solutions is an initiative to improve farming efficiency and profitably by setting up ag-savings account for farmers to deposit money to receive quality, certified agricultural inputs from agricultural groups VITALITE partners with.

**Increase Yields**
Farmer acquire **certified inputs for higher yields** (1.5-2x) and better produce

**Secure Savings**
The **lay-by, ag-savings account** enables farmers to deposit funds over time **at any time**

**Get Inputs on Time**
Farmers receive inputs **before the first rains**, so they can plant in time

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**How Agri-solutions Work**
- **March 1**: Ag-savings accounts open. Farmers receive PAYGO ID
- **Jan-May**: Farmers generate higher yields
- **Nov-Jan**: Farmers plants improved seeds and uses inputs
- **Before Nov 22**: Farmers receive free delivery of inputs at agent shops
- **August 15**: Farmer receives call once input prices are finalized
- **October 31**: Accounts close and balances are settled
- **March-Oct**: Farmers deposit money through VITALITE agents
- **May-Sept**: Farmers sell products and receive income

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**VITALITE partners**
As an agent, you will set up lay-by cards to farmers with specific lay-by IDs corresponding to separate ag-savings account. This is **no-risk** to you and you make money each time a farmer deposits money!

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**Agri-Innovations**

Agri-Innovations are a collection of videos that you can show in your shop on a VITALITE-provided **TV**. Playing these videos is an easy way to improve your community and attract customers. These videos also help your customers become **more productive farmers** while learning more about VITALITE’s agri-solutions.

*Contact your SSR to help install the TV and invite your customers to watch the videos and consider your products.*

**Other Product Opportunities**

After 3 months, based on your performance and the quality of your customer base, you will have the opportunity to **increase your inventory** and **sell a diversity of products** over time.

- Larger Solar Home Systems (with TVs)
- SF1 Solar Irrigation Pumps
- Ecozoom Mbualas
- Cell Phones (to existing PAYGO customers)
- **Future Products as VITALITE continues to innovate**
PAYMENT AND PENALTY

Payment Options
Each product has its own method of payment. SHS are Cash & Carry or PAYGO, while the Agri-solutions cards are lay-by.

<table>
<thead>
<tr>
<th>PAYGO (Pay-As-You-Go)</th>
<th>Lay-By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer makes payments to own the product over a set period of time</td>
<td>Customer deposits money into their account towards ownership</td>
</tr>
<tr>
<td>Upon completion of total payment, they will fully own the product</td>
<td>Customer will receive the product once they deposit enough money</td>
</tr>
</tbody>
</table>

For the Basic Solar Home System, there are 2 PAYGO plans

<table>
<thead>
<tr>
<th>12-Month Plan (MP)</th>
<th>18-Month Plan (MP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commitment Fee</td>
<td>K 150</td>
</tr>
<tr>
<td>Daily Top-up</td>
<td>K 4</td>
</tr>
<tr>
<td>Top-up Total</td>
<td>K 4 * 358 = 1,472</td>
</tr>
<tr>
<td>Total</td>
<td>K 1,582</td>
</tr>
</tbody>
</table>

Upon completion of **ALL payments on time**, you will receive a **K 40 bonus** if your customer does not have 20 Missed Days

Penalty Structure for PAYGO
It is very important that you remind your customer to pay before their system shuts off. Your job is to guarantee their payments. Help them follow these steps:

**How to Prevent Missed Days**

1. Set up a schedule for payments
2. Remind them to make a payment once PAYGO Indicator blinks orange
3. Explain the calendar to reach their goal

**RECOLLECTION**
Ensure that the customer knows that after **90 consecutive missed days** or **120 accumulated missed days** the system will be **BLOCKED**.
PAYGEE

The new platform to track and register PAYGO customers is through an app called Paygee, which helps monitor your balance, keep track of customers, and make sales.

The following chart shows you the process of how to use Paygee:

1. Creating a **Lead**, someone who is a potential customer
2. Completing the **Application Form**, so VITALITE can evaluate the sale.
3. Creating an **Order**

---

**Creating a Lead**

1. Press "Create Lead"
2. Enter all the information needed

**Can the customer commit today?**

- **NO**
  1. Press "No"
  2. Enter "Follow-up Date"
  
  1. Press "Lead Follow-up"
  2. Click Lead's name
  3. Press "+" sign
  4. Press "Application Form"

- **YES**
  1. Press "Yes" and "Submit"

**Complete Application Form**

1. Swipe right to go through all the steps and answer all the question
2. Enter your FULL contractor ID
3. Press "Request" once ready

**Lead is "Rejected"**

1. Call VITALITE Agent Care Line for more information
2. Re-examine application to see potential issues

**Lead is "Approved"**

1. Click on "+ ADD PRODUCT"
2. Choose "ON LOAN" (PAYGO) or "UPFRONT" (Cash & Carry)
3. Follow the rest of the steps

**Initial Payment**

Make sure the customer pays you!
Tokens are unique codes to enter into the solar home system to activate it. Based on how much the customer pays, the token could keep the system active for a few days or a few months.

<table>
<thead>
<tr>
<th>Payment #</th>
<th>Equation</th>
<th>Example</th>
</tr>
</thead>
</table>
| 1         | K 150 for deposit. Divide remainder based on plan | Customer pays K 210 on 12-MP  
K 210 – K 150 = K 60  
K 60/K 4 = 15 day token |
| 2+        | Divide amount based on plan: K3 for 18-MP, K4 for 12-MP | Customer pays K 300 on 18-MP  
K 300/K 3 = 100 day token |

You use Mobile Money to receive the tokens. Here is how you can get started:

**How to Register on Airtel**

1. Dial *778# and select Option #7, "My Account".
2. Select Option #2: "Change Pin."
3. Default pin is 1234, change to new pin.

**How to Send Money on Airtel**

1. Dial *778#: Then choose #4 Make Payments  
#8, Other Business,  
#5 VITALITE
2. Enter amount, your PAYGO ID, and PIN.
3. Confirm payment and you’ll receive an SMS with the Token.

**How to Register on MTN**

1. Activate your SIM card by opening the menu on your phone.
2. Visit an MTN center or MTN money agent with your N.R.C. or passport.
3. Fill out money registration form and confirm registration with the agent.

**How to Send Money on MTN**

1. Dial *303#: Then choose #3 Solar Payment,  
#1 VITALITE
2. Enter your PAYGO ID, and the amount
3. Receive SMS to confirm transaction and enter PIN to receive Token.
MARKETING AND SALES
Together, these two sets of skills will help you figure out who your customers are, attract them to buy from you, and finally, make an effective sale.

Below are the steps you should follow for both marketing and sales to become effective at distributing your products to your community:

1. TARGET AND SEGMENT THE MARKET
   - Who do you want to sell to?
   - Where will most of your customers be?
   - How will you reach them?

2. COMMUNICATE TO ATTRACT PEOPLE
   - Marketing material
   - Branding
   - Spreading the word

3. SALES PITCH
   - Assess interest and need
   - Offer solutions
   - Describe value

4. EVALUATE THE CUSTOMER
   - What is their source of income?
   - When and how often can they pay?
   - How will they make payments?
   - Do you trust this customer?

5. BEGIN SERVICING
   - If the customer meets the criteria above, you should begin the sell. If not, you should refuse to sell to them.

VITALITE
Quality Made Affordable

Miller Center
for Social Entrepreneurship

Santa Clara University
Choosing the Right Customer
Remember Step 4, because choosing the *right* customer is very important to YOUR success, as shown below:

<table>
<thead>
<tr>
<th>Risks</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unnecessary Service Time</td>
<td>Improve Business</td>
</tr>
<tr>
<td>Effort needed to contact customer</td>
<td>More time to grow business</td>
</tr>
<tr>
<td>Restricted Product Inventory</td>
<td>More Product Opportunity</td>
</tr>
<tr>
<td>Cannot sell more or other products</td>
<td>Can sell wide variety of products</td>
</tr>
<tr>
<td>Recollection</td>
<td>Customer Relationships</td>
</tr>
<tr>
<td>Remove SHS from customers</td>
<td>Trusted member of the community</td>
</tr>
<tr>
<td>End of VITALITE Partnership</td>
<td>Valuable Agent Making</td>
</tr>
<tr>
<td></td>
<td>Lots of Money</td>
</tr>
</tbody>
</table>

**COMMISSIONS**
As an agent, you earn profit through commission

<table>
<thead>
<tr>
<th>Cash &amp; Carry</th>
<th>Lay-By</th>
<th>PAYGO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single commission upon the sale of a product. Varies by product</td>
<td>• 5% Instant Commission from each deposit</td>
<td>• Initial sales commission</td>
</tr>
<tr>
<td></td>
<td>• 5% on MRI Products</td>
<td>• 5% top-up commission</td>
</tr>
<tr>
<td></td>
<td>• 3% on YARA Products</td>
<td>• Bonus (if less than 20 total missed days)</td>
</tr>
</tbody>
</table>

For the sale and servicing of a basic solar home system

<table>
<thead>
<tr>
<th>PAYGO Payment Plan</th>
<th>Initial Sales Commission</th>
<th>Total Top-up Commission</th>
<th>Bonus</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-Month Plan</td>
<td>K 60</td>
<td>K4 * 358 days * 5% = K 71.6</td>
<td>K 40</td>
<td>K 171.6</td>
</tr>
<tr>
<td>18-Month Plan</td>
<td>K 60</td>
<td>K3 * 540 days * 5% = K 81</td>
<td>K 40</td>
<td>K 181</td>
</tr>
</tbody>
</table>

**Commission Structure**
You will need to **deposit money into your Paygee account to make more sales**. Each time a customer pays you, that amount will be subtracted from your Paygee account and you will have the cash in hand. Once you report the sale, you will receive the proper amount of commission, deposited into your Paygee account.
TRIPLE P SERVICING

Taking care of the customer’s needs by providing and delivering **professional, proactive, productive** service and assistance is crucial to doing a good job.

**Professional**

______________________________

**Proactive**

______________________________

**Productive**

______________________________

**Professional**

1. Record each customer’s account in an **organized manner**
2. Maintain **clear communication** with your sales and service representative
3. Promote a positive brand image by being polite and respectful

**Proactive**

1. **Contact the sales and service representative of any issues** as soon as possible and **prepare solutions for customers** to help with any issues
2. Service customers immediately after your receive their payment
3. Maintain a **positive balance** in your Paygee account

**Productive**

1. Contact each customer and **remind them about payments**
2. Write and record receipts for each customer
3. Continue learning from subsequent training programs

Effective customer servicing **begins with evaluating and selecting your customers** during the first sale. Selling quality products to unprepared customers **runs the risk that your customer may default.**

**If you cannot answer a question, please direct the customer to the VITALITE Customer Care Lines and contact SSR to find the answer in case someone else has a similar question.**
Over **10 million Zambians** do not have energy to light their homes. Too many Zambians are left underserved. They do not have access to fundamental resources. *This* is hurting the **future of our country**.

The only way to change this problem and shape the future of Zambia is to create better access to these resources. This will create a country of opportunity for all of us.

**With VITALITE, you can create this access to quality goods and services for all.**

Providing products like solar home systems and agricultural inputs will improve lives and transform your community. Students will study longer, farmers will harvest more, and households will be wealthier, because of you and your partnership with VITALITE.

Become an agent, work hard, and you will see your business grow as your community changes. **Together, we will energize Zambia.**

**AGENT HELP**

If you have any questions or need help, try different options

1. Contact other agents you met at the training
2. Contact the Sales and Service Coordinator
3. Contact the Regional Coordinator
4. Contact VITALTE Agent Care Lines: **+260979165740**

As an agent, you also have the option to purchase a basic solar home system on the 12-month plan. Instead of paying K150 for the registration fee, you will only need to pay K10, but the daily payments are still necessary.
Full Name: ____________________________________________________
Phone number: _________________________________________________
N.R.C Number: ________________________________________________
Exam Date: _____________________________________________________

**Expectations and Opportunities as a VITALITE Agent (6 marks)**

1. Name 3 expectations of being a VITALITE agent (3 marks)
   1. __________________________________________________________
   2. __________________________________________________________
   3. __________________________________________________________

2. Name 3 expectations VITALITE provides in this partnership (3 marks)
   1. __________________________________________________________
   2. __________________________________________________________
   3. __________________________________________________________

**Product Knowledge (14 marks)**

3. For the basic solar home system... (12 marks)
   a) Name 2 benefits of buying the basic solar home system
      1. __________________________________________________________
      2. __________________________________________________________
   b) When should a customer clean their solar panel? ________________
   c) What is the lifespan of the battery box? ________________________
   d) What is the warranty for the radio? ____________________________
e) What is the warranty for the SHS (excluding radio)? _______________

f) How many hours can the system power all 3 LED lamps if the battery is fully charged? ____________________

g) Name the five components in the basic solar home system
   1. ________________________________________________
   2. ________________________________________________
   3. ________________________________________________
   4. ________________________________________________
   5. ________________________________________________

4. Name 2 of the 3 benefits of agri-solutions (2 marks):
   1. ________________________________________________
   2. ________________________________________________

---

Payment and Paygee (15 marks)

5. Define the following payment options (5 marks)
   a) Cash & Carry: ___________________________________________
   b) PAYGO: _____________________________________________
   c) Lay-by: _____________________________________________
   d) For a PAYGO system, how many missed days lead to 1 penalty day? _____________
   e) How many total missed days can a customer have before the system is blocked? ________________

6. To create a lead for your customer on Paygee, you need to: (3 marks)
   1. ___________________________________________________
   2. ___________________________________________________
   3. ___________________________________________________

7. To submit an order for your customer, you need to: (3 marks)
   1. ___________________________________________________
   2. ___________________________________________________
   3. ___________________________________________________
8. If a customer pays K200 as their initial payment, how many days have they paid for, if it is a 12-month plan (K4 daily)? (2 marks)

9. If a customer pays K150 to top-up for the 2nd time and it is the 18-month plan, what would the token look like? (2 marks)

Sales and Marketing (10 marks)

10. As a VITALITE agent, what is the most important step in marketing and sales? (1 mark)
   a. Targeted and segment the market
   b. Communication to attract people
   c. Sales Pitch
   d. Evaluate the Customer
   e. Begin the Service

11. Circle who is a good-quality customer? (2 marks)

   Person A: Government worker, Paid weekly, Mobile money, Travels a lot
   Person B: Schoolteacher, Paid monthly, No mobile money, Lives far away
   Person C: Farmer, Paid by the season, No mobile money, Dedicated
   Person D: Fisherman, Paid irregularly, No mobile money, Very friendly

12. What are 2 risks of choosing a bad customer? (2 marks)
   1. 
   2. 

13. Where do most of your commissions from selling a SHS with a PAYGO plan come from? (1 mark)
   a. Initial Sales
   b. Top-ups
   c. Bonus
14. Why is it important to continue depositing money into your Paygee account? (1 mark)
   a. To keep track of your spending
   b. To acts as a savings account
   c. To make sales and top-ups
   d. To register new customers

15. Based on the case study, what makes an agent successful? (3 marks)
   1. ______________________________________________________
   2. ______________________________________________________
   3. ______________________________________________________

**Triple P Servicing (5 marks)**

16. What are the three values of Triple P Servicing? (1 mark)
   a. Patient, Practicable, Positive
   b. Professional, Proactive, Productive
   c. Proficient, Profitable, Precautious
   d. Passionate, Persistent, Personable

17. A customer tells you that their battery box is not working. What do you tell them to do? (1 mark)
   a. The system may be turned off, use the remote to switch it on
   b. Check the blinking light, if it is red, the payment has expired
   c. The battery is completely empty and you see blinking green bars
   d. All the above

18. What is the best way a customer can check their balance? (1 mark)
   a. Look on the battery box and check the number
   b. Call customer care for the right answer
   c. Check the SMS message after making a top-up payment
   d. Talk to the agent to get more information

19. What is the most common mistake that an agent makes when they register a system? (1 mark)
   a. Input the payment type incorrectly
   b. Write the wrong receipt
   c. Enter wrong customer information
   d. Recording the incorrect PAYGO ID

20. If you can’t answer a customer’s question, what should you do? (1 mark)
   a. Look in your manual to see if the answer is there
   b. Tell the customer to call Customer Care
   c. Contact your SSR to find the answer
   d. All the above
<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Introductory Training</td>
<td>Provide rudimentary technical knowledge and skills to make initial sales</td>
</tr>
<tr>
<td>1 Week</td>
<td>First SSR Check-in and Customer Guide</td>
<td>SSR calls or visits agent to answer any initial questions and make sure agent is properly supplied and ready. Explanation of installation process for the customer</td>
</tr>
<tr>
<td>2 Weeks</td>
<td>Defaulting Customer Reminder</td>
<td>Agent reminded about choosing good customers, top-ups, and consequences of defaulting customers</td>
</tr>
<tr>
<td>1 Month</td>
<td>New Lessons</td>
<td>Agent can choose which modules they would like to learn, but heavy emphasis on Customer Care, Payment, or Sales &amp; Marketing</td>
</tr>
<tr>
<td>2 Month</td>
<td>Evaluation and Product List</td>
<td>Evaluation of agent performance and increase diversity of products</td>
</tr>
<tr>
<td>3 Months</td>
<td>New Lessons and Brief Refresher Trainings</td>
<td>SSR visits and provides another topic to learn about based on interest of the agent. Quick refresher videos will be important to ensure information retention on previous topics</td>
</tr>
<tr>
<td>Every Month</td>
<td>Refresher Training</td>
<td>All the basic information is reviewed in a one-day training (no manual required). Provides a forum for agents to discuss relevant problems and give suggestions to solved issues</td>
</tr>
<tr>
<td>Topic</td>
<td>Lesson</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Customer Care</strong></td>
<td>Solar Home System Installation</td>
<td>Provide details on how to install the solar panels and position lights</td>
</tr>
<tr>
<td></td>
<td>Customer Defaulting</td>
<td>Remind about consequences of defaulting customers and the procedure for collecting SHS kits.</td>
</tr>
<tr>
<td></td>
<td>Battery Box Features</td>
<td>Learn more about the other features of the battery box, how they function, and their practical use</td>
</tr>
<tr>
<td></td>
<td>Troubleshooting Guide</td>
<td>Provides information to help solve common problems that customers may encounter</td>
</tr>
<tr>
<td><strong>Payment</strong></td>
<td>Mobile Money Review</td>
<td>Ensure agent knows how to make payments using mobile money and better understands the value</td>
</tr>
<tr>
<td></td>
<td>Advice for Top-Ups</td>
<td>Methods to influence better payment strategies/PAYGO for customers</td>
</tr>
<tr>
<td></td>
<td>Problem Solving</td>
<td>Making good decisions under pressure and methods to improve on basic math calculations for payments</td>
</tr>
<tr>
<td></td>
<td>mFinance</td>
<td>Teach about this new form of payment for government employees to pay</td>
</tr>
<tr>
<td><strong>Product</strong></td>
<td>Cooking Solutions</td>
<td>Technical information about the Mbaula</td>
</tr>
<tr>
<td></td>
<td>Solar Irrigation Pump</td>
<td>Explain operational and technical information</td>
</tr>
<tr>
<td></td>
<td>Larger Solar Home Systems</td>
<td>Discuss these larger systems equipped with TVs</td>
</tr>
<tr>
<td></td>
<td>Cell Phones</td>
<td>Information about how to sell a cell phone</td>
</tr>
<tr>
<td></td>
<td>Hands-on Product Learning</td>
<td>Interactive activity on how to use a specific product, where agent can receive hands-on experience</td>
</tr>
<tr>
<td><strong>Sales &amp; Marketing</strong></td>
<td>Sales</td>
<td>Offer advice to increase sales and evaluate the agent’s sales ability through a role play activity</td>
</tr>
<tr>
<td></td>
<td>Marketing</td>
<td>Discuss different options to better market products, providing marketing material</td>
</tr>
<tr>
<td></td>
<td>Recruit More Customers</td>
<td>Discuss strategies to recruit more customers, including asking for recommendations and exploring different venues</td>
</tr>
<tr>
<td><strong>Business</strong></td>
<td>Financial Management</td>
<td>Teach methods to better manage money, including options of saving money and creating cash flow charts to predict profit and loss</td>
</tr>
<tr>
<td></td>
<td>Customer Management</td>
<td>Show different ways to stay organized, keep track of customers, and ensure payments</td>
</tr>
<tr>
<td></td>
<td>Inventory/Stock Detailing</td>
<td>Keeping track of products and making sure all items are accounted for</td>
</tr>
<tr>
<td></td>
<td>Business Scaling</td>
<td>Discuss methods to increase one’s business and be able to do more</td>
</tr>
<tr>
<td></td>
<td>Communication Skills</td>
<td>Teaching how to effectively communicate with difficult customers and discuss with the SSR</td>
</tr>
</tbody>
</table>
Strategic Planning

Setting goals to envision where the agent wants their business to be; demonstrate capabilities

Time Management

Basic practices to use time more wisely to achieve more and focus on activities that will best help the business

Refresher Courses

Questions/concerns that agents frequently mention or SSRs notice

Training Roadmap
New Module Template

**MODULE TEMPLATE**

**Problem:**

**Solution:**

**Value/Importance:**
- 
- 
- 

**How it Works:**

[List of Parts or replace with a graphic or advice to better explain]
## Standardized Customer Logbook

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Transaction</th>
<th>Amount Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ex. 10-6-18</td>
<td>Banda Witola</td>
<td>Top-up – 30 days (18 MP)</td>
<td>K 90</td>
</tr>
<tr>
<td>10-8-18</td>
<td>Chibwe Gondo</td>
<td>Buy PSHS 7500 – 27 days (12 MP)</td>
<td>K 230</td>
</tr>
</tbody>
</table>
VITALITE 12-Month Plan Payment Tracker

Customer Name: ___________________________ Type of System Bought: ___________________________
Date Started: ___________________________

Month 1

1  2  3  4  5  6  7
8  9  10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30

Month 2

31 32 33 34 35
36 37 38 39 40 41 42
43 44 45 46 47 48 49
50 51 52 53 54 55 56
57 58 59 60

Month 3

61 62 63
64 65 66 67 68 69 70
71 72 73 74 75 76 77
78 79 80 81 82 83 84
85 86 87 88 89 90

Month 4

91 92 93 94 95 96
97 98 99 100 101 102 103
104 105 106 107 108 109 110
111 112 113 114 115 116 117
118 119 120

Month 5

121 122 123 124
125 126 127 128 129 130 131
132 133 134 135 136 137 138
139 140 141 142 143 144 145
146 147 148 149 150

Month 6

151 152
153 154 155 156 157 158 159
160 161 162 163 164 165 166
167 168 169 170 171 172 173
174 175 176 177 178 179 180

Month 7

181 182 183 184 185 186 187
188 189 190 191 192 193 194
195 196 197 198 199 200 201
202 203 204 205 206 207 208
209 210

Month 8

211 212 213 214 215
216 217 218 219 220 221 222
223 224 225 226 227 228 229
230 231 232 233 234 235 236
237 238 239 240

Month 9

241 242 243
244 245 246 247 248 249 250
251 252 253 254 255 256 257
258 259 260 261 262 263 264
265 266 267 268 269 270

Month 10

271 272 273 274 275 276
277 278 279 280 281 282 283
284 285 286 287 288 289 290
291 292 293 294 295 296 297
298 299 300

Month 11

301 302 303 304
305 306 307 308 309 310 311
312 313 314 315 316 317 318
319 320 321 322 323 324 325
326 327 328 329 330

Month 12

331 332 333 334 335 336 337
338 339 340 341 342 343 344
345 346 347 348 349 350 351
352 353 354 355 356 357 358
359 360 361 362 363 364 365

Missed Days Counter

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
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<td>14</td>
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<td>59</td>
<td>60</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Penalty Days Added

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For every 10 missed days, 1 penalty day is added!

After 120 TOTAL missed days or 60 CONSECUTIVE missed days, the system is blocked and ALL payments are forfeited.
CUSTOMER MANUAL

“Quality service through training”

Made in Partnership with VITALITE by the Miller Center for Social Entrepreneurship at Santa Clara University
Solar Home System Installation Process

Installation Process

- Place the solar panel in direct sunlight for maximum performance, facing straight up to the sky. Avoid any shading from nearby trees or buildings. The angle should be at least 15 degrees to ensure that the rain can wash dirt from the panel. Make sure that the solar panels are securely mounted to withstand heavy winds and storms.

- Mount the battery box on the wall (with the screws and wall plugs provided). Make sure the battery box is indoors only! Ensure it is positioned at a very safe height where children cannot reach it easily.

- Place the lamps at your desired location and use the hook screw to attach onto the wall. Make sure the cable is not pulled too tight. Connect the panel to the yellow socket of the battery box. Connect the cable of the Fosera lamp to one of the blue sockets on the battery box.

- Once you connect to the solar panel to the battery box, the solar charge light will switch on in orange color to indicate that the system battery is charging and is connected to the solar module.

Notes:
- ONLY connect the solar panel to the yellow port.
- A special outlet is marked as “NL” and has four different functions:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal Outlet</td>
<td>Acts like a normal outlet</td>
</tr>
<tr>
<td>Night Light</td>
<td>Switches on as soon as it is dark outside. Switches off during the daytime (use to power a security light)</td>
</tr>
<tr>
<td>Priority Outlet</td>
<td>When battery is nearly empty, the outlet switches off automatically (power low-priority loads like a TV)</td>
</tr>
<tr>
<td>Excess Outlet</td>
<td>Always on when battery is full, even when brightest LED is on</td>
</tr>
</tbody>
</table>
BATTERY BOX IN DETAIL

Charge any phone or Fosera radio
Receives command from the remote control
Shows system status
Indicates amount of charge in battery
Turns on when receiving charge
Activates battery bar and can reset system
Unique number used to identify the system

USB Port
Remote Receiver
PAYGO Indicator
Battery Bar
Charge Light
Test Button
PAYGO ID Number

PAYGO Indicator

<table>
<thead>
<tr>
<th>Indicator will flash</th>
<th>System is</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red:</td>
<td>Not active</td>
</tr>
<tr>
<td>Orange:</td>
<td>Active for less than 7 days</td>
</tr>
<tr>
<td>Green:</td>
<td>Active for more than 7 days</td>
</tr>
</tbody>
</table>

Battery Bar

81-100%
51-80%
26-50%
0-25%

Green blinking bars indicate a completely empty battery
CHECKING EXACT NUMBER OF DAYS ACTIVE

Description

To see the actual PAYGO days for the system:

1. Press the question mark button
2. Record each time the light blinks green
   - NOTE: Orange lights in between the green lights separate the digits between the ones, tens, and hundreds place.

For example

If the number of days paid for is 5, by pressing on the question mark, the PAYGO indicator will blink 5 green colors, and a color combination of Red-Green-Orange will flash 3 times to indicate end of count.

If the number of days paid for is 24, by pressing on the question mark, the PAYGO indicator will blink green 2 times, followed by a flashing orange light, and 4 green blinks. A color combination of Red-Green-Orange will flash 3 times to indicate end of count.

Checking your Credit Balance

By pressing the ? button you can check the remaining days of credit in the system. It will blink the remaining credit out with green blinking separated by an orange blink. For example, if you have 14 days of credit, you will see this blinking pattern:

```
[1] [-----------4-----------]
Green Orange Green Green Green Green Orange
```
Frequently Asked Questions

Where does a customer make payments for their solar home system?
A customer makes payments through a certified VITALITE agents, who will always issue an official VITALITE receipt of payment made. If a customer cannot reach an agent, they should make a payment via Airtel or MTN Mobile Money.

A customer complains that their system is shut off, what do I do?
A VITALITE solar home system will only shut off when:

▪ Payment made has expired, PAYGO indicator blinks Red
▪ Battery is completely empty, indicated by green blinking battery bars.
▪ A remote has been used to switch off the system

If none of these is the problem, please report to the VITALITE customer care team immediately!

Can a customer only make one daily payment at a time?
No, a customer can pay for as many days in advance as possible! We advise customers to pay monthly or even weekly, so that they will have less missed days.

What if the customer doesn’t have the exact payment?
VITALITE through Paygee, will credit the remainder to the customer’s account. This will appear as change on the customer information and will be added to the next top-up payment.

For example, you would like to pay for 6 days at a cost of K 18, but you pay K 20, Paygee will add the remaining K 2 to your next payment.

How does a customer check the balance on their loan?
Upon making payment, a customer receives an SMS on how many days paid for and how many days remaining.

If a customer does not use their PAYGO Solar home system, do they still pay?
Yes, the customer makes payment towards ownership of the VITALITE solar home system, and not simply to have lighting.

If you cannot answer a question, please direct them to the VITALITE Customer Care Lines

• +260976147432
• +260967147432
• +260955147432