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VITALITE: New Training Curriculum for Professional Development

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Training for Success

New Training Curriculum for Professional Development



Drew Descourouez & James Wang

EXECUTIVE SUMMARY

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.

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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.

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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.

Prepared by:





INITIAL AGENT TRAINING MANUAL

"Quality service through training"

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



Miller Center
for Social Entrepreneurship



**Santa Clara
University**

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COMPONENTS OF THE TRAINING MANUAL FOR THE TRAINING TEAM

Training Objectives.....	- 1 -
Expectations and Opportunities as a VITALITE Agent.....	- 2 -
Overview	- 4 -
Solar Home System (SHS).....	- 5 -
Agri-Solutions.....	- 6 -
Payment and Penalty.....	- 8 -
Paygee	- 9 -
Tokens.....	- 10 -
Marketing and Sales	- 11 -
Commissions	- 12 -
Triple P Servicing.....	- 13 -
Call to Action.....	- 14 -
Agent Help	- 14 -

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



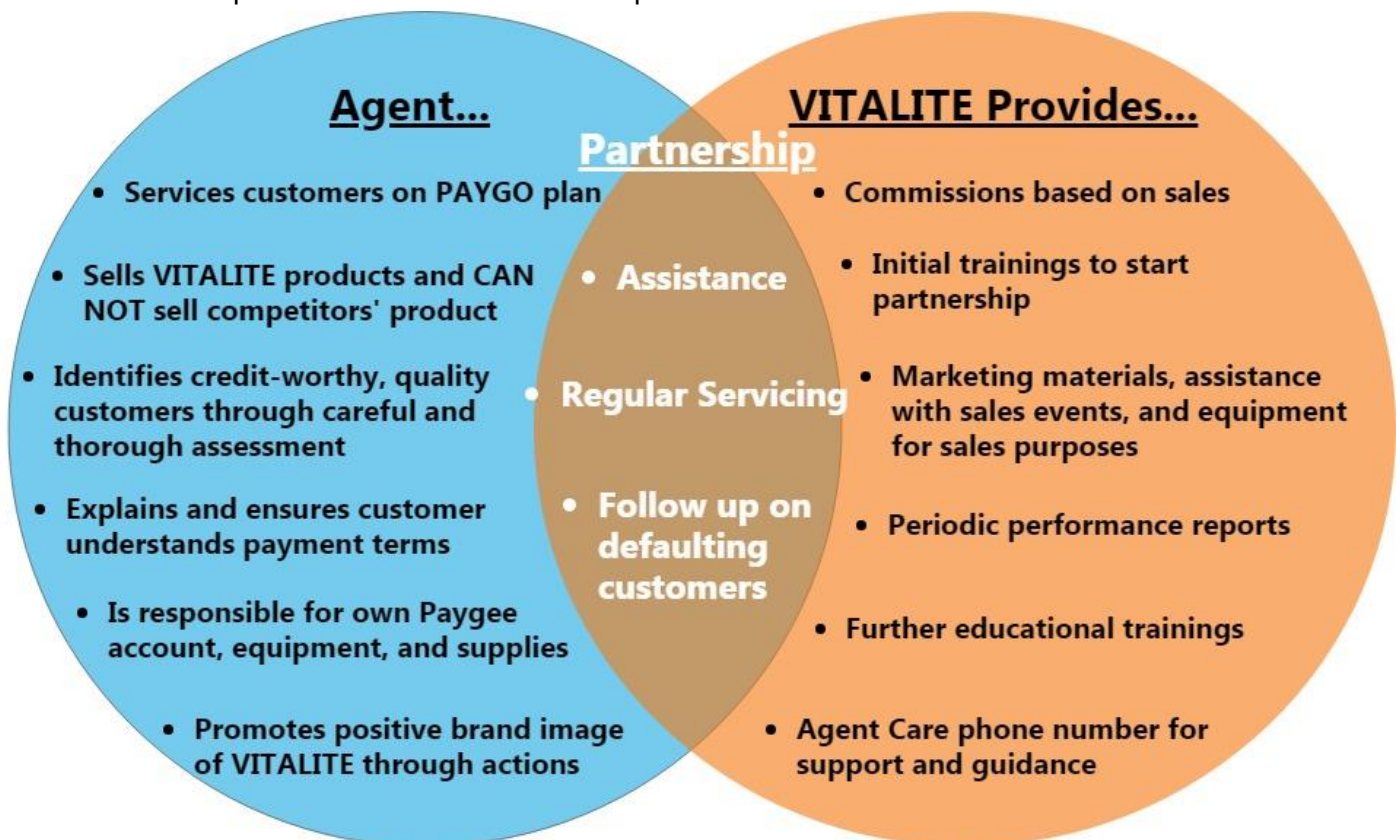
EXPECTATIONS AND OPPORTUNITIES AS A VITALITE AGENT

This is an opportunity for you to become an entrepreneur.

This is an **investment in yourself!**



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



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

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?



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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

Solar Home System (SHS)	Cooking Solutions	Agricultural Products
<p>The Solar Home System is a German-made product that is durable, providing reliable lighting and power using solar energy.</p> 	<p>Ecozoom charcoal stoves use 70-80% less charcoal for the same cooking energy and promotes household hygiene by reducing kitchen ash.</p> 	<p>Increased access to agricultural inputs and products to empower farmers with technology and information to improve practices</p> 
<p>1. PSHS7500</p> <ul style="list-style-type: none"> a. Powers up to 3 LED lamps and radio b. Basic Kit <p>2. LSHS4500</p> <ul style="list-style-type: none"> a. 15.6-in TV and 3 LED lamps b. Small Entertain. Kit <p>3. LSHS10500</p> <ul style="list-style-type: none"> a. 23.6-in TV and 4 LED lamps b. Large Entertain. Kit 	<p>1. Mbaula Fresh</p> <ul style="list-style-type: none"> a. Saves up to 70% on charcoal use b. Lasts up to 5 years c. 1 Year Warranty d. 26 cm diameter <p>2. Mbaula Jet</p> <ul style="list-style-type: none"> a. Saves up to 80% on charcoal use b. Lasts up to 5 years c. 2 Year Warranty d. 28 cm diameter 	<p>1. Agricultural Inputs</p> <ul style="list-style-type: none"> a. Lay-by Card for <ul style="list-style-type: none"> i. Seeds ii. Fertilizers iii. Herbicides iv. Agro-chemicals <p>2. SF1 Solar Irrigation Pumps</p> <ul style="list-style-type: none"> a. Increase yields and irrigation efficiency b. Water storage and drip irrigation up to 1200 sq. meters
Add-on Products:	Agri-Innovations	
<p>Good-paying PAYGO customers can buy Add-On products such as smartphones and pay for them over a specified period of time.</p> 	<p>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.</p>	

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.

Part	Features	Image
Solar Panel (6 Watt)	<ul style="list-style-type: none"> • Very durable with 5 m-long cable; charges battery box after 2 hours of direct sunlight • Clean two times every month 	
LED Lamps	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • Controls the charge in the system • Connects lamps and solar panel • High-quality Lithium-ion battery • Lifespan: 7-10 years 	
Remote Control	<ul style="list-style-type: none"> • Turns the system on and off • Enter tokens into the battery box 	
Radio	<ul style="list-style-type: none"> • 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



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



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 Mbaulas
- 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.

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

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

	12-Month Plan (MP)	18-Month Plan (MP)
Commitment Fee	K 150	K 150
Daily Top-up	K 4	K 3
Top-up Total	K 4 * 358 = 1,472	K 3 * 540 = 1620
Total	K 1,582	K 1,770

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

1 Penalty Day
=
10 Missed Days in a row
=
Paying for an Extra Day

RECOLLECTION

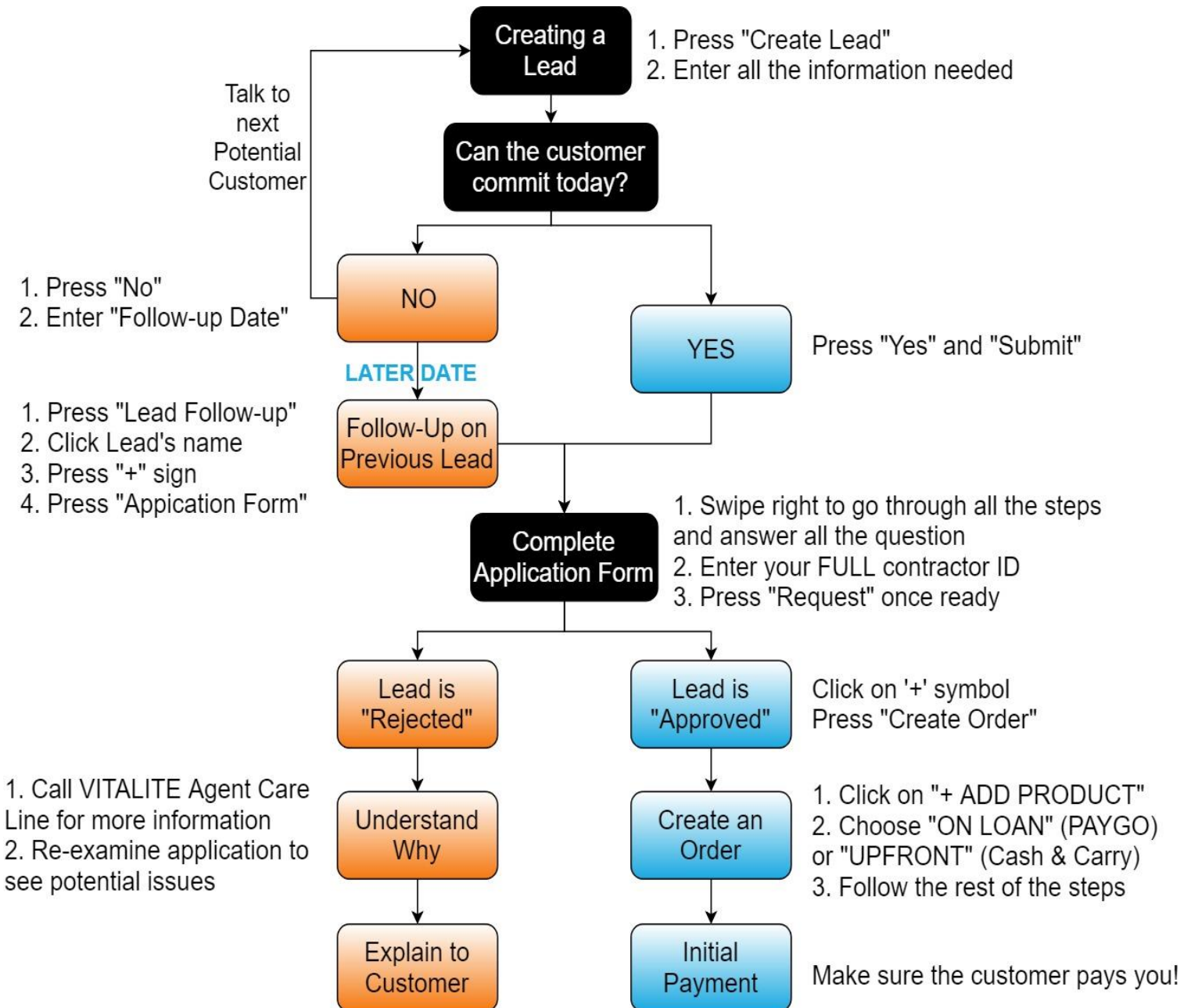
Ensure that the customer knows that after **90 consecutive missed days** or **120 accumulated missed days** the system will be **BLOCKED**.

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**



TOKENS

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.

Payment #	Equation	Example
1	K 150 for deposit. Divide remainder based on plan	Customer pays K 210 on 12-MP $K\ 210 - K\ 150 = K\ 60$ $K\ 60 / K\ 4 = 15\ \text{day token}$
2+	Divide amount based on plan: K3 for 18-MP, K4 for 12-MP	Customer pays K 300 on 18-MP $K\ 300 / K\ 3 = 100\ \text{day token}$

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

How to Register on Airtel



How to Send Money on Airtel



How to Register on MTN



How to Send Money on MTN



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

You can REFUSE service to any customer

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



Choosing the Right Customer

Remember Step 4, because choosing the *right* customer is very important to **YOUR** success, as shown below:

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

COMMISSIONS

As an agent, you earn profit through commission

Cash & Carry	Lay-By	PAYGO
Single commission upon the sale of a product. Varies by product	<ul style="list-style-type: none"> • 5% Instant Commission from each deposit • 5% on MRI Products • 3% on YARA Products 	<ul style="list-style-type: none"> • Initial sales commission • 5% top-up commission • Bonus (if less than 20 total missed days)

For the sale and servicing of a basic solar home system

PAYGO Payment Plan	Initial Sales Commission	Total Top-up Commission	Bonus	Total
12-Month Plan	K 60	$K4 * 358 \text{ days} * 5\% =$ K 71.6	K 40	K 171.6
18-Month Plan	K 60	$K3 * 540 \text{ days} * 5\% =$ K 81	K 40	K 181

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.

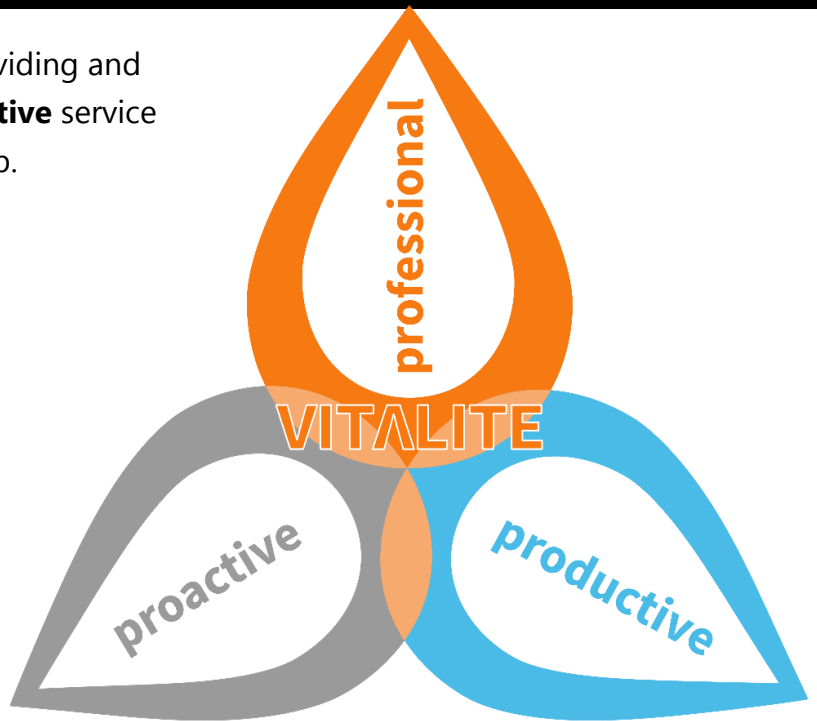
TRIPLE P SERVICING

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 you receive their payment
3. Maintain a **positive balance** in your Paygee account

Productive

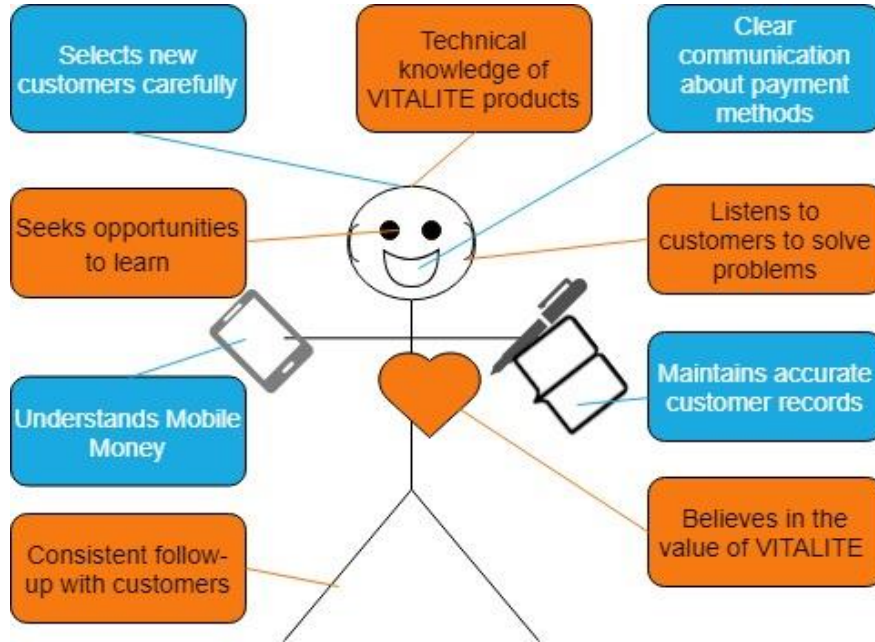
1. Contact each customer and **remind them about payments**
2. Write and record receipts for each customer
3. Continue learning from subsequent training programs

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.

CALL TO ACTION

Qualities of a Good Agent



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.



Quality service through training

VITALITE Agent Test

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)
- Targeted and segment the market
 - Communication to attract people
 - Sales Pitch
 - Evaluate the Customer
 - 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)
- Initial Sales
 - Top-ups
 - 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

Potential Schedule

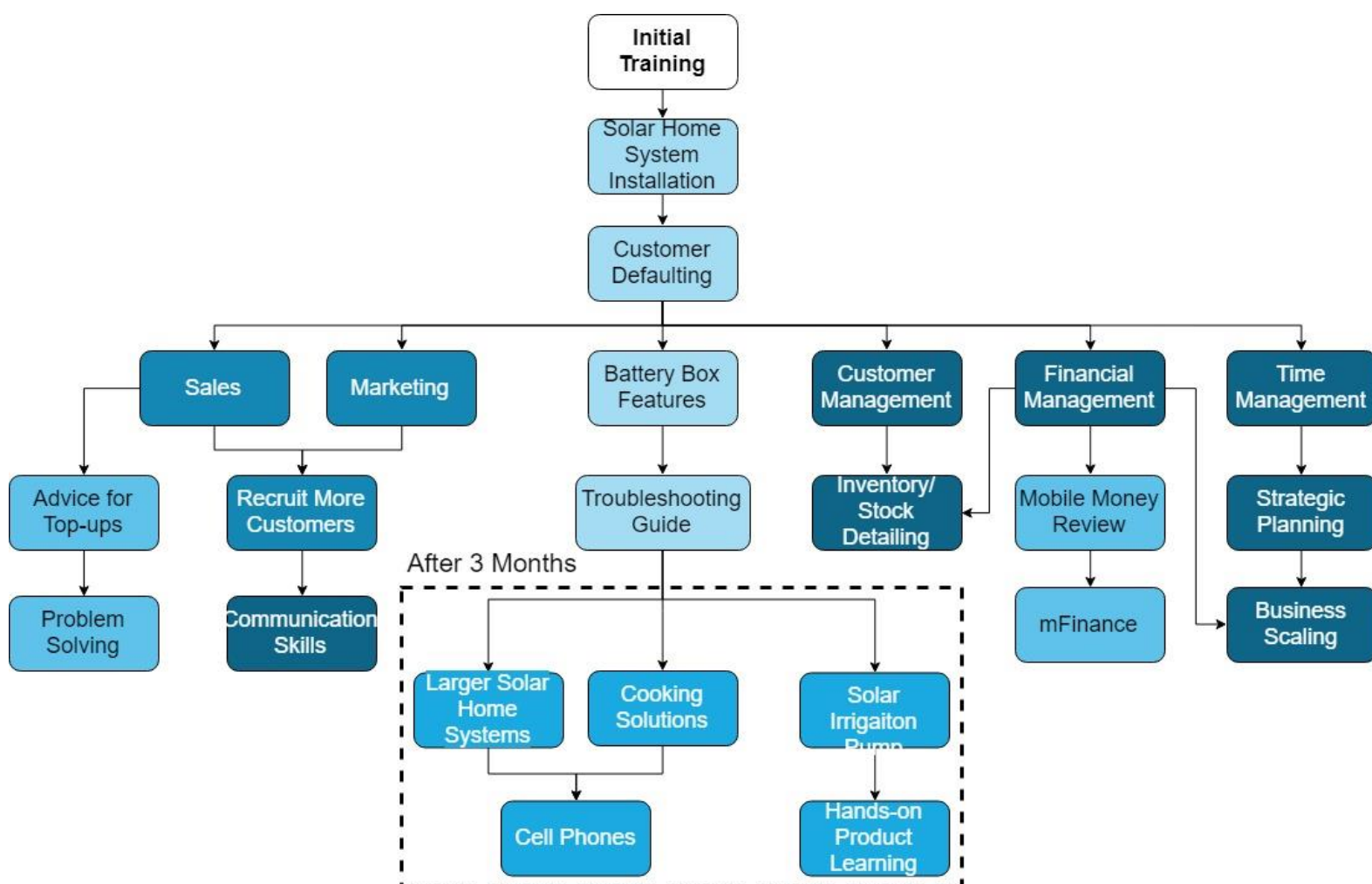
Time	Item	Description
0	Introductory Training	Provide rudimentary technical knowledge and skills to make initial sales
1 Week	First SSR Check-in and Customer Guide	SSR calls or visits agent to answer any initial questions and make sure agent is properly supplied and ready. Explanation of installation process for the customer
2 Weeks	Defaulting Customer Reminder	Agent reminded about choosing good customers, top-ups, and consequences of defaulting customers
1 Month	New Lessons	Agent can choose which modules they would like to learn, but heavy emphasis on Customer Care, Payment, or Sales & Marketing
2 Month		
3 Months	Evaluation and Product List	Evaluation of agent performance and increase diversity of products
Every Month	New Lessons and Brief Refresher Trainings	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
1 Year	Refresher Training	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

Module Ideas

Topic	Lesson	Description
Customer Care	Solar Home System Installation	Provide details on how to install the solar panels and position lights
	Customer Defaulting	Remind about consequences of defaulting customers and the procedure for collecting SHS kits.
	Battery Box Features	Learn more about the other features of the battery box, how they function, and their practical use
	Troubleshooting Guide	Provides information to help solve common problems that customers may encounter
Payment	Mobile Money Review	Ensure agent knows how to make payments using mobile money and better understands the value
	Advice for Top-Ups	Methods to influence better payment strategies/PAYGO for customers
	Problem Solving	Making good decisions under pressure and methods to improve on basic math calculations for payments
	mFinance	Teach about this new form of payment for government employees to pay
Product	Cooking Solutions	Technical information about the Mbaulta
	Solar Irrigation Pump	Explain operational and technical information
	Larger Solar Home Systems	Discuss these larger systems equipped with TVs
	Cell Phones	Information about how to sell a cell phone
	Hands-on Product Learning	Interactive activity on how to use a specific product, where agent can receive hands-on experience
Sales & Marketing	Sales	Offer advice to increase sales and evaluate the agent's sales ability through a role play activity
	Marketing	Discuss different options to better market products, providing marketing material
	Recruit More Customers	Discuss strategies to recruit more customers, including asking for recommendations and exploring different venues
Business	Financial Management	Teach methods to better manage money, including options of saving money and creating cash flow charts to predict profit and loss
	Customer Management	Show different ways to stay organized, keep track of customers, and ensure payments
	Inventory/Stock Detailing	Keeping track of products and making sure all items are accounted for
	Business Scaling	Discuss methods to increase one's business and be able to do more
	Communication Skills	Teaching how to effectively communicate with difficult customers and discuss with the SSR

	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:

[IMAGE HERE]

Value/Importance:

-
-
-

How it Works:

[LIST OF PARTS OR REPLACE WITH A GRAPHIC OR ADVICE TO BETTER EXPLAIN]

[IMPORTANT TAKEAWAY INFORMATION HERE]

Standardized Customer Logbook

[illegible]

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						
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	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			

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	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			

Penalty Days Added						
1	2	3	4	5	6	7
8	9	10	11			

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

VITALITE 18-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

Month 13						
361	362	363	364	365	366	367
368	369	370	371	372	373	374
375	376	377	378	379	380	381
382	383	384	385	386	387	388
389	390					

Month 14						
		391	392	393	394	395
396	397	398	399	400	401	402
403	404	405	406	407	408	409
410	411	412	413	414	415	416
417	418	419	420			

Month 15						
				421	422	423
424	425	426	427	428	429	430
431	432	433	434	435	436	437
438	439	440	441	442	443	444
445	446	447	448	449	450	

Month 16						
	451	452	453	454	455	456
457	458	459	460	461	462	463
464	465	466	467	468	469	470
471	472	473	474	475	476	477
478	479	480				

Month 17						
			481	482	483	484
485	486	487	488	489	490	491
492	493	494	495	496	497	498
499	500	501	502	503	504	505
506	507	508	509	510		

Month 18						
					511	512
513	514	515	516	517	518	519
520	521	522	523	524	525	526
527	528	529	530	531	532	533
534	535	536	537	538	539	540



CUSTOMER MANUAL

"Quality service through training"

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



Miller Center
for Social Entrepreneurship



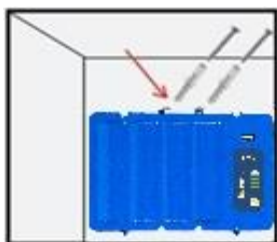
**Santa Clara
University**

Solar Home System Installation Process

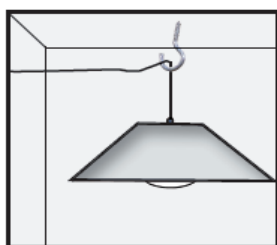
Installation Process



□ 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.



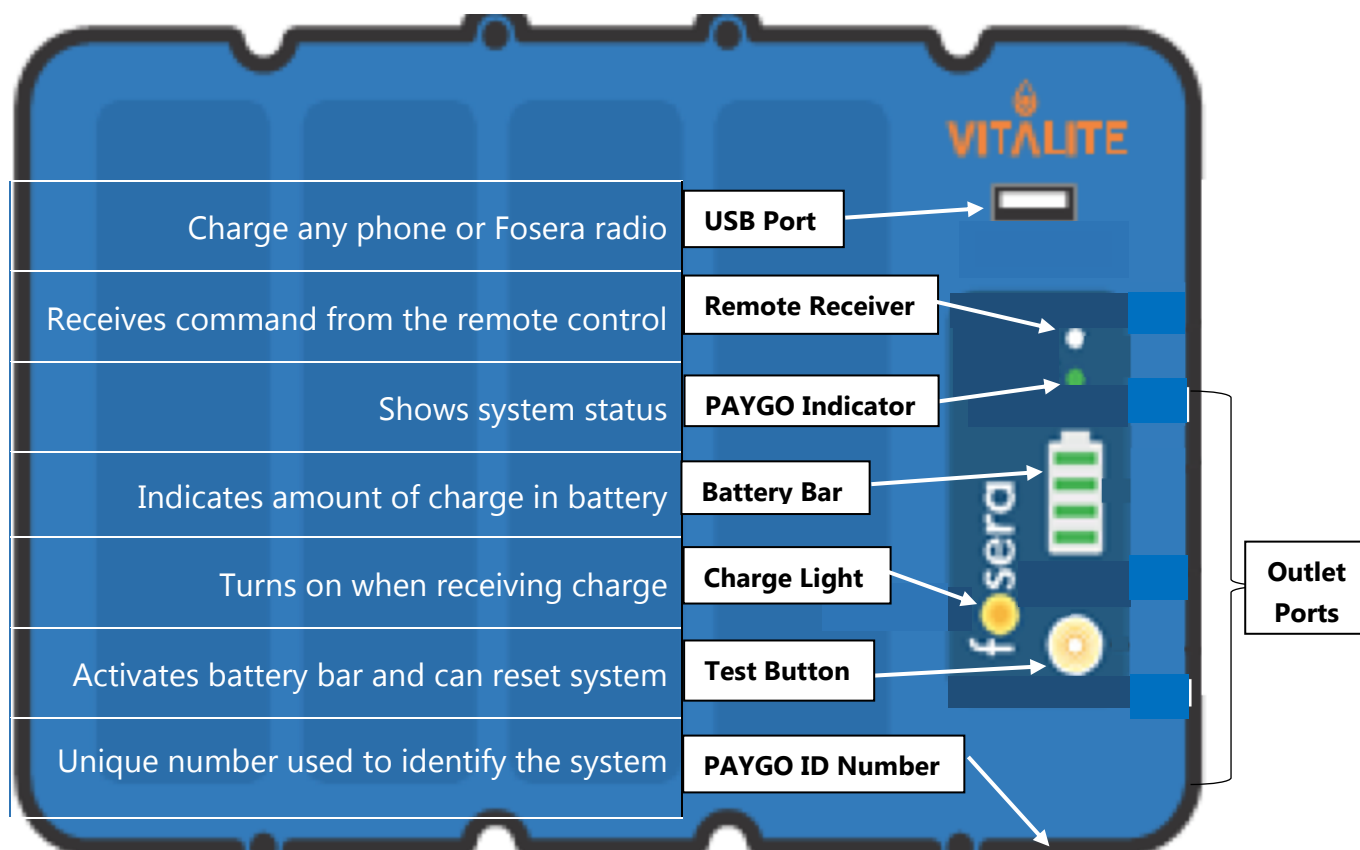
□ Once you connect to the solar panel to the battery box, the solar charge light will switch on in orange color to indicate that the system battery is charging and is connected to the solar module.

Notes:

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

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

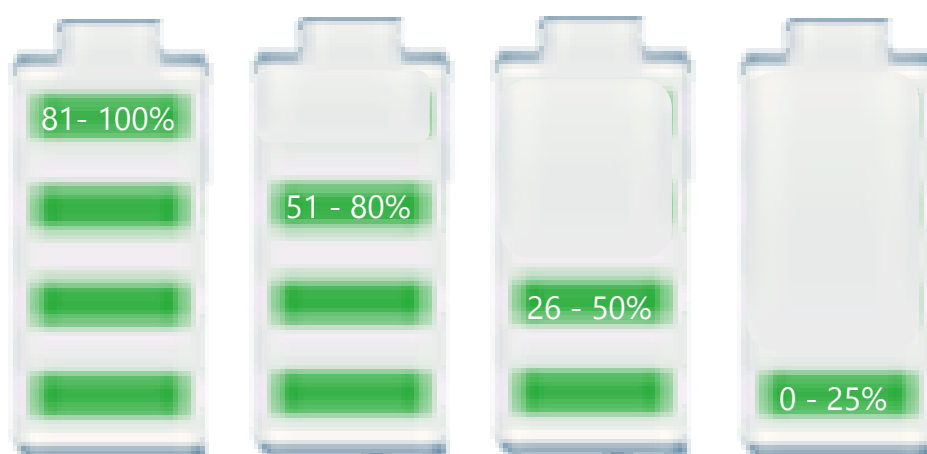
BATTERY BOX IN DETAIL



PAYGO Indicator

Indicator will flash	System is
Red:	Not active
Orange:	Active for less than 7 days
Green:	Active for more than 7 days

Battery Bar



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:



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 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**