A big toolbox.

One useful step today.

The back office is robust. Learn it in strides. One short lesson and one useful action each day builds a routine you can actually use.

Your pace

Read for about five minutes. Open the tool. Apply one task. Explain what happened. Return tomorrow or repeat the same lesson until it feels familiar.

Four ways to learn

- Live workbook: private saved reflections for approved team accounts.
- This PDF: clickable links and fillable reflection fields. Save a personal copy.
- Interactive HTML: downloadable reading and presentation mode.
- Markdown or text: editable teaching notes.

Your notes belong to you

Use learning reflections, not prospect names, contact details, passwords or confidential documents. Downloaded files do not sync progress back to GPSS. Self-checks do not grant certification, company rank or product authorization.

Open the live workbook

Your desk, one step at a time

A robust system gives you choices. You do not need every tool on your first day. Choose one useful skill, apply it, then return tomorrow. Five minutes of learning plus one real action is a productive start.

FIND IT / Getting Started Right

1. Open the first-day checklist.
2. Choose Classic or Command Center. Both use the same permitted CRM records.
3. Find the link back to the other workspace. Save open forms before switching.

Open the GPSS tool

USE IT TODAY

Open both workspaces and pick the one you will use for your next working session.

Useful result: I can find my desk, my learning area and my next task.

QUICK SELF-CHECK

A new associate opens ten tools and feels stuck. What is the smallest useful next step?

A. Explore everything before beginning
B. Choose one lesson and one application task
C. Create a second account for the new desk

Practice answer: B. One useful action builds confidence. Both workspaces use the same account and records.

Which tool will you use tomorrow, and why?

☐ I learned it ☐ I applied it Confidence / 5: ☐

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Your account is your responsibility

Use the exact approved team email and your own account. Keep passwords, recovery codes and API keys private. Opening a tool does not prove that a service, phone number or paid AI connection is configured.

FIND IT / Account security

1. Review your existing account security settings.
2. Find Sign out. Use it on a shared device.
3. Read the privacy notice before handling prospect details.

Open the GPSS tool

USE IT TODAY

Explain where confidential documents should go: an approved secure intake workflow, never a practice chat or public post.

Useful result: I know what information I must keep out of practice notes.

QUICK SELF-CHECK

Someone asks you to send a password so they can help. What do you do?

A. Share it privately in chat
B. Use the approved support/recovery process without sharing the password
C. Put it in your workbook

Practice answer: B. An approved support process protects access. Never share passwords or keys.

Where will you keep sensitive information out of your sales routine?

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A useful day starts with a next move

Activity targets help you focus. They are not completed activity or guaranteed sales. Start with due commitments, then reserve time for new conversations and one learning task.

FIND IT / My Daily

1. Review due tasks and follow-ups.
2. Choose a realistic time block for outreach.
3. Set your target in the existing goals tools.

Open the GPSS tool

USE IT TODAY

Plan one 30-minute session: review two records, prepare one conversation and record the next commitment.

Useful result: My plan identifies a task, a time and an outcome I can control.

QUICK SELF-CHECK

You have two overdue commitments and twenty new ideas. What comes first?

A. Review the due commitments and prioritize them
B. Mark everything complete
C. Forecast twenty sales

Practice answer: A. A commitment has an owner and a due date. Review it before adding more activity.

What will you do, when will you do it, and how will you record it?

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One record for one opportunity

A useful lead includes the business type, service interest, contact permission, ownership and a next step. Search existing records before adding another. The owner can assign company inquiries. Associates work with their permitted leads.

FIND IT / Lead capture

1. Search Leads for an existing match first.
2. Open card/photo/QR capture and review extracted details.
3. Confirm business type and contact details before saving a genuine prospect.

Open the GPSS tool

USE IT TODAY

Use a fictional card for practice without submitting it as a real lead. For a real prospect, verify permission and save only accurate information.

Useful result: I can explain the difference between a practice example and a company lead.

QUICK SELF-CHECK

OCR reads a business-card email incorrectly. What happens next?

A. Save it without checking
B. Review and correct the extraction before saving
C. Email every possible address

Practice answer: B. Extraction helps with typing. You remain responsible for confirming the details.

Recall day 1: where do you find Leads from each workspace?

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The conversation starts with their need

Lead with a recognizable problem, explore its consequence, and connect a relevant solution. Ask: What is taking more time or money than it should? What have you tried? Who else helps make the decision?

FIND IT / Service-fit guide

1. Choose the sales environment that matches your conversation.
2. Open Match needs and choose business or household.
3. Select the most important need first and review the suggested service references.

Open the GPSS tool

USE IT TODAY

Practice a three-minute discovery conversation. Ask two open-ended questions before describing a product.

Useful result: I can repeat the prospect’s priority in their own words.

QUICK SELF-CHECK

A family asks about household support. The guide suggests no matching active category. What should you do?

A. Force a merchant-processing pitch
B. Arrange a relevant consultation without inventing a fit
C. Promise all services are available

Practice answer: B. The guide supports discovery. A missing fit calls for a conversation, not an unsupported offer.

Which question helped you understand the real issue?

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A relevant prospect beats a random list

Research public business information and record the source. Confirm what you cannot verify. A name on a profile does not prove purchasing authority, timing or interest. Respect opt-outs and contact preferences.

FIND IT / Decision-maker prospecting

1. Review a suitable business and its public website.
2. Identify the likely decision role and distinguish facts from assumptions.
3. Prepare one question about the business and one permission-based next-step ask.

Open the GPSS tool

USE IT TODAY

Prepare a short research brief: verified fact, possible need, question to confirm, and useful GPSS service reference.

Useful result: I can show the source of each fact and label my assumptions.

QUICK SELF-CHECK

You cannot verify who approves a telecom change. What is a useful question?

A. Who handles connectivity decisions, and how do they evaluate changes?
B. I know you are the buyer
C. Can you approve it right now?

Practice answer: A. Ask about the process and role. Do not assume authority.

What evidence would make this prospect worth a conversation?

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Your field route is a working plan

A route helps organize visits. Business discovery may be incomplete or temporarily unavailable. Confirm the address and opening hours before traveling. A selected pin is a planned stop, not a completed conversation.

FIND IT / Route planner

1. Enter a starting address or choose a starting point.
2. Review nearby businesses and select the ones you want in the visit queue.
3. Review the stops, create the route and record genuine visit outcomes.

Open the GPSS tool

USE IT TODAY

Build a small route of up to three suitable stops. Keep a fallback list and avoid changing records while driving.

Useful result: I can distinguish planned stops, completed visits and qualified opportunities.

QUICK SELF-CHECK

A business appears on the map. Does that mean you have contacted it?

A. Yes, count it as outreach
B. No, it is a discovery result until you actually act
C. Yes, count it as a qualified lead

Practice answer: B. Discovery, outreach and qualification are different activities. Record each honestly.

What will you do if a business is closed or a map source fails?

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A visual should move the conversation

The best asset answers the prospect’s current question. Use current approved materials, preserve provider terms and check links before sharing. Your personal QR helps a person reach your information or request a next step.

FIND IT / Product assets

1. Find the material for the relevant service or product.
2. Read the current terms, date and intended audience.
3. Open your existing personal QR/contact card and check its destination.

Open the GPSS tool

USE IT TODAY

Choose one asset for a café, one for a professional office or one for a household. Explain why it fits before sharing it manually.

Useful result: I can say what question this asset helps answer.

QUICK SELF-CHECK

A terminal sheet includes conditions. What should you do when presenting it?

A. Hide the conditions to make it simpler
B. Explain the relevant conditions and confirm current availability
C. Guarantee approval

Practice answer: B. Clear terms support trust and a useful decision. Do not promise availability or approval.

Recall day 4: which details do you review before saving a captured lead?

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Interest needs a clear bridge

A meeting request should explain who, why, format, topic and the desired next step. A requested time is not necessarily a confirmed appointment. Check the actual status and confirmation before promising it.

FIND IT / Appointment request

1. Choose the appropriate meeting format and topic.
2. Include the issue to discuss and requested representative when available.
3. Review the request status and prepare the relevant resource.

Open the GPSS tool

USE IT TODAY

Write a concise agenda for a 15-minute consultation. Use a fictional scenario for practice and do not submit a fake booking.

Useful result: My agenda states the need, the decision participants and the desired outcome.

QUICK SELF-CHECK

A form says appointment requested. What can you safely tell the member?

A. The meeting is definitely confirmed
B. The request is submitted; confirm the actual status and next steps
C. The product is approved

Practice answer: B. A request and a confirmed appointment are different states. Verify the actual result.

What must you know before this meeting begins?

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Follow-up is a kept promise

Use the sales cycle: Find, Qualify, Present, Propose, Close and Grow. Existing CRM labels may differ. Keep the record accurate and agree a next action and date. A stopped or opted-out lead is not permission for another message.

FIND IT / Reviewable Pipeline

1. Read the last interaction and contact preferences.
2. Draft the appropriate next step for review.
3. Record the real outcome and next date in the existing tools.

Open the GPSS tool

USE IT TODAY

Draft a brief follow-up that references the actual conversation, answers one need and asks for one clear next step. Review it before sending manually.

Useful result: My draft is relevant, respectful and consistent with permission.

QUICK SELF-CHECK

A prospect asks you to stop contacting them. What should you do?

A. Schedule another campaign
B. Respect and record the opt-out in the approved workflow
C. Switch to a different channel to get around it

Practice answer: B. An opt-out must inform future actions. Never work around it with another channel.

What promise did you make, and where is the next action recorded?

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Practice before the real conversation

Free Practice & Planning uses built-in exercises. Optional Live AI needs a funded connection and processing consent. AI can help prepare, but you must verify facts, pricing, eligibility and terms. Training progress does not grant partner authorization.

FIND IT / Growth Coach

1. Choose free practice or optional Live AI intentionally.
2. Describe a fictional scenario and the sales stage.
3. Evaluate the reply for unsupported claims and rewrite it in your own voice.

Open the GPSS tool

USE IT TODAY

Practice one objection: “I already have a provider.” Ask what works well and what the owner would improve. Finish with a low-pressure review invitation.

Useful result: I can explain which parts are facts, suggestions and items requiring confirmation.

QUICK SELF-CHECK

The coach invents a savings number. What should you do?

A. Use it because it sounds convincing
B. Remove it and verify a full-cost comparison before claiming savings
C. Round it up

Practice answer: B. A confident answer is not evidence. Verify the claim and its assumptions.

Which open-ended question moves this concern into discovery?

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Your signal can drop

Set up the encrypted Offline Field Desk on your trusted device while online. It captures drafts for later review and sync. Live AI, messages, provider activation and current CRM information still need connectivity. Keep your vault recovery method secure.

FIND IT / Offline Field Desk

1. Open the setup guidance on the device you will actually use.
2. Review the encryption and recovery instructions.
3. Reconnect, review drafts and sync once. Check the outcome before retrying.

Open the GPSS tool

USE IT TODAY

Explain your field fallback plan without submitting fictional leads to production. Identify what you can capture offline and what must wait.

Useful result: I can explain draft, queued, synced and failed states.

QUICK SELF-CHECK

Your offline draft exists on your tablet. Has it activated a merchant account?

A. Yes
B. No, it still requires review, sync and authorized processing
C. Yes, once the app closes

Practice answer: B. An offline draft records information. It cannot activate a provider account.

Recall day 7: how do planned stops differ from completed visits?

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The relationship continues after the sale

After an authorized enrollment, confirm the actual service status and the next support contact. Ask for honest feedback without pressuring for positive reviews. Relevant referrals grow from a good experience, not a promise of guaranteed results.

FIND IT / Follow-up queue

1. Review the actual recorded outcome and service status.
2. Set a useful check-in date through existing tools.
3. Prepare one service-experience question and a relevant support next step.

Open the GPSS tool

USE IT TODAY

Draft a member check-in: “How is the new setup working in your day, and what still needs attention?” Keep it ready for human review.

Useful result: I can separate a CRM status, a provider approval and a commission estimate.

QUICK SELF-CHECK

The CRM says Won. What does that prove by itself?

A. The commission has been paid
B. Only that the record has that CRM status
C. Every provider has activated the account

Practice answer: B. Verify enrollment, activation and payout through their actual authorized records.

What would make a check-in helpful to this member?

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Your own repeatable sales routine

You now have a route through a large system. Keep it small enough to repeat: review due work, prepare the next conversation, record the outcome and learn one skill. Return to any lesson when you need it.

FIND IT / Your Command Center

1. Find a permitted opportunity and read its history.
2. Prepare a relevant question and service reference.
3. Agree and record a next action, then review one learning point.

Open the GPSS tool

USE IT TODAY

Complete a fictional teach-back: show a teammate how to find a lead, prepare a meeting, locate an asset and record a follow-up. A manager can separately assess readiness.

Useful result: I can demonstrate the routine without exposing a real person’s private data.

QUICK SELF-CHECK

You completed this workbook. What changes automatically?

A. You receive a professional license
B. Nothing about access, rank, partner authorization or credentials
C. All accounts become visible

Practice answer: B. This workbook supports learning and self-reported application. GPSS controls access and authorization separately.

What did you attempt, what did you learn, and what is tomorrow’s commitment?

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A little learning.

A useful action every day.

Your 15-minute team huddle

2 minutes: name one lesson you tried.

5 minutes: demonstrate a tool with fictional information.

5 minutes: practice a concern and give specific feedback.

3 minutes: each person states tomorrow’s commitment.

A simple weekly review

What did I attempt? What changed because I tried it?

Which part of the site still confuses me?

What can I now demonstrate without help?

What is the next commitment, and when will I do it?

Keep learning in GPSS University

Use scored training and approved product references for deeper knowledge. Ask GPSS to confirm access, partner authorization and any enrollment requirements separately.