



XO Limited

# Barter Exchange Administrator Weekly Checklist

Name \_\_\_\_\_ Date \_\_\_\_\_ Email Address \_\_\_\_\_  
Phone \_\_\_\_\_ Supervisor \_\_\_\_\_

- ☐ Ordered plastic transaction cards for all members
- ☐ Sent plastic transaction cards to be printed
- ☐ Posted out last-weeks plastic transaction cards to members
- ☐ Sent out the weekly email newsletter
- ☐ Edited the email templates to promote those members wanting trade
- ☐ Sent overdue cash reminder emails
- ☐ Sent overdue cash reminder SMS messages
- ☐ Sent email reminders about networking meetings
- ☐ Sent SMS reminders about networking meetings
- ☐ Posted out welcome packs to new customers
- Number of welcome packs sent out
- ☐ Posted out information packs to prospects
- Number of information packs sent out
- ☐ Attended weekly sales meeting
- Y/ N Minutes of weekly sales meeting attached
- ☐ Made test call to Customer Service Centre / Call Centre
- ☐ Wrote feedback email on test call and sent to Call Centre
- Y/ N Copy of email attached

Summary of other activities undertaken during week:

Bugs with software (please attach screen-shots):

Software feature requests (please attach screen-shots):

I, \_\_\_\_\_ certify that the above is true and correct.

Signed \_\_\_\_\_ Date \_\_\_\_\_

Manager Signed \_\_\_\_\_ Date \_\_\_\_\_

Please return this form to your supervisor and/or XO if required