

CONFIDENTIAL



Beeline[®]
BIKES

Operations Manual

V2.2

SECTION 1 – INTRODUCTION TO BEELINE BIKES

BEELINE BIKES INC.	1
THE MOBILE BIKE SHOP	1
TECHNOLOGY INTEGRATION	1
THE BEELINK PLATFORM	1
BEELINE UNIVERSITY	2
BEELINE SUPPORT	2

SECTION 2 - OPERATING CHECKLISTS

BEGINNING OF DAY CHECKLIST	4
CONSUMER CALL CHECKLIST	5
CORPORATE CALL/ EVENT CHECKLIST	7
END OF DAY CHECKLIST	9
WEEKLY CHECKLIST	10
MONTHLY CHECKLIST	10

SECTION 3 – MECHANICAL SERVICE STANDARDS & PRICING

BEELINE BIKES SERVICE GUARANTEE	12
TOOLS	12
BEELINE BIKES CORE SERVICES	13
PRICING GUIDELINES	18

SECTION 4 – INVENTORY AND SUPPLY CHAIN

SETTING INVENTORY LEVELS ON YOUR MOBILE SHOP	22
RESUPPLY PROCEDURE	23
SPECIAL ORDER PROCESS	25
PRODUCT WARRANTIES	27
PRODUCT RECALLS	29
INVENTORY COUNTS	30
BIKE FULFILLMENT	31

SECTION 5 - BEST PRACTICES AND CUSTOMER SERVICE

SCHEDULING	33
CUSTOMER INTERACTION	36
SELLING TECHNIQUES	39
DRIVING AND PARKING	42

SECTION 6 – MARKETING

BRAND MARKETING	45
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LOCAL AREA MARKETING	47
CORPORATE ACCOUNTS	49
SOCIAL MEDIA	51

SECTION 7 – THE BEE LINK PLATFORM

BEE LINK WEBSITES	55
BEE LINE BIKES.COM FOR CUSTOMERS	56
BEE LINK DASHBOARD	57
MANAGE CUSTOMER ACCOUNTS	58
MANAGE APPOINTMENTS	62
EDITING A CORPORATE/GROUP APPOINTMENT	67
SCHEDULING ALGORITHM EXPLAINED (INDIVIDUAL/CONSUMER APPOINTMENTS ONLY)	68
INTERNAL “BEE LINE” NOTES	69
MINOR APPOINTMENT ADJUSTMENTS USING “TWEAK”	70
USING FILLERS	71
USING THE MOBILE SYLLABUS	72
TAKING AND UPLOADING A PICTURE	74
MECHANIC NOTIFICATIONS	79
APPOINTMENT AVAILABILITY BY ZIP CODE	80
CUSTOMER EMAILS	81
POINT OF SALE (POS)	83

SECTION 8 – POLICIES

SERVICE DELIVERY POLICIES	88
CUSTOMER RETURN POLICY	90

SECTION 9 – REPORTING AND FINANCIAL ACTIVITIES

OVERVIEW	92
DAILY ACTIVITIES	92
WEEKLY ACTIVITIES	92
MONTHLY BOOKKEEPING AND REPORTING ACTIVITIES	93
BOOKKEEPING SERVICES	93
APPENDIX ITEMS	93

SECTION 10 – COMPLIANCE

BRAND STANDARDS	94
SERVICES	94
PRODUCTS	95
PROFESSIONALISM STANDARDS	96
OPERATIONS REVIEW	97

AUDITS	97
DEFAULT, CURE AND TERMINATION PROCESS	98
SAFETY	99
INSURANCE	100
LEGAL	101

SECTION 11 – APPENDIX

APPENDIX A - SAMPLE CHART OF ACCOUNTS, P&L AND BALANCE SHEET	103
APPENDIX B - WEEKLY ROYALTY & SETTLEMENT REPORT	108
APPENDIX C - BOOKKEEPING SERVICES	109
APPENDIX D – MINIMUM TOOLS LIST	110
APPENDIX E -CORPORATE PROGRAMS INFORMATION	113

Section 1 – Introduction to Beeline Bikes

Beeline Bikes Inc.

Beeline Bikes offers customers a convenient solution for all bicycling needs. This includes bicycle repair, advice, new bicycles sales, and parts and accessory sales and installation.

The Mobile Bike Shop

The heart of the Beeline Bikes operation is the Mobile Bike Shop, operated by a professional bicycle mechanic, and fully equipped with product and tools to handle 100% of normal bicycle repairs. By making the bicycle shop mobile, each Beeline Bikes customer enjoys the ultimate in convenience, a friendly low-pressure sales experience, and transparency into the operation of their bicycle related purchase.

This Operations Manual often uses the term “Mechanic” when discussing the Mobile Bike Shop operations. “Mechanic” can mean a Lead Mechanic” and/or a Franchise Owner.

Technology Integration

Beeline Bikes leverages the benefits of multiple technologies to ensure the customer has the best experience possible. The technology packages are also designed to make the mechanic more efficient and profitable in their tasks.

The BeeLink Platform

The BeeLink Platform consists of both a customer facing website as well as the backend dashboard used by the mechanic. BeeLink is built for both a desktop and mobile device experience.

- The customer facing side of BeeLink consists of the Beeline Bikes website which allows the customer to easily view available service appointment times, book a specific appointment time for one or multiple bicycles, manage their account, view past appointments, and view recommended next services for each bike.
- The Mechanic facing side of BeeLink consists of a dashboard that allows the mechanic to manage their service appointments, customer relationship manager (CRM), bicycle relationship manager (BRM), and manages corporate account appointments.

- Point of Sale (POS). The Lightspeed point of sale system (POS) is a tightly integrated part of BeeLink, communicating with beelinebikes.com to maintain a seamless experience for the customer. The POS handles duties including customer transactions, Work Orders (WO), sales, receipt creation, inventory resupply, and financial reports.

Beeline University

Mechanics use Beeline University for initial and ongoing training and certification regarding:

- Bicycle mechanics and best practices
- Operation of a Mobile Bike Shop and related systems
- Bicycle specialty technical certifications
- Best business practices

Beeline Support

Mechanics use Beeline Support for all support needs including:

- Bicycle technical support
- Inventory supply chain
- Special order, warranty & returns support
- Technical support for BeeLink

Section 2 - Operating Checklists

Beginning of Day Checklist

- Respond to emails and phone calls that came in the previous night
- Review Appointment Calendar and Syllabus in web dashboard to review upcoming appointments
- Open register in POS / count cash box
- Check day's appointments for any special inventory needs and load onto Mobile Bike Shop from supply storage if applicable
- Create WO in POS with any applicable discounts
- Confirm sales tax rates have been applied to customer in POS (if applicable)

Consumer Call Checklist

Pre-Appointment Checklist

- Review customer-provided notes and internal notes prior to appointment.
- Review customer location and determine route for driving
 - See (Using the Mobile Syllabus – Section 7)
- Call customer at least ½ hour before appointment start time
 - Let customer know you are on your way
 - Give customer your ETA
 - If customer doesn't pick-up, leave message stating your planned arrival time.

Begin Appointment Checklist

- Arrive at customer's location no later than 5 minutes before scheduled time.
- Park Mobile Bike Shop
 - Park legally on the street unless customer gives you express permission to use their driveway
 - Be conscious of any driveway you may be blocking
- Knock on customer's door
 - Introduce yourself as “[name] with Beeline Bikes”
- Explain to the customer what will happen next
 - “First I'll take a look at your bicycle(s) and make an assessment of what the bike needs. Then I'll run through the bike with you [customer] and get your approval before doing any work.”
- Ask customer about:
 - How they use their bike
 - When the last time it was tuned up (if not done by Beeline)
 - Any specific concerns they have about the bike's condition
- Assess bike(s) and run through recommended service with customer
 - See *Selling Techniques* – Section 5
 - See *Service Standards and Pricing* – Section 3 for pricing structure
 - See *Work Order Structure* – Section 7 for creating WOs and notes
 - Notate any service the customer declines
- Perform Service – See *Service Standards and Pricing* – Section 3 for labor standards

End-of-Appointment Checklist

- Run through all the service performed
 - Play back any particular issues customer had and describe action taken to fix these specific problems
 - Highlight any discounts the customer received

- Note in the WO any recommendations (service/parts) that the customer passed on.
- Close out the WO in POS, then finalize the appointment on BeeLink (see *Using the Mobile Syllabus* – Section 7)
 - Make sure to load picture on and set service reminder
- Contact customer and take payment (see *Taking Payment* – Section 7)
- Drive Away
- If the customer expressed a particular concern about their bike prior to service, follow up with customer 2-4 days after the appointment to confirm the service met or exceeded their expectations.

Corporate Call / Event Checklist

Pre-Appointment Checklist

- Review event notes and internal notes prior to appointment.
- Load any special equipment need for event
- Review event location and determine route for driving
 - See Using the Mobile Syllabus – Section 7

Begin Appointment Checklist

- Arrive at event location sufficiently early to have set up complete at least 5 minutes before scheduled time.
- Park Mobile Bike Shop
 - Park at designated spot for corporate visit or event – reference Location Details to confirm parking area
- Greet customers as they approach the Mobile Shop
- Explain to the customer what will happen next
 - “First I’ll take a look at your bicycle(s) and make an assessment of what the bike needs. Then I’ll run through the whole assessment with you {customer} and get your approval before doing any work.”
- Ask customer about
 - How they use their bike
 - When the last time it was tuned up (if not done by Beeline)
 - Any specific concerns the customer has about how the bike works
- Ask customer how they preferred to be contacted
 - Phone/email text
 - Ask customer about any time constraints for picking up their bike (i.e. afternoon meetings, catching a commuter bus/train)
- Assess bike(s) and run through recommended service with customer
 - See *Selling Techniques* – Section 5
 - See *Service Standards and Pricing* – Section 3 for pricing structure
 - See *Work Order Structure* – Section 7 for creating WOs and notes
 - Notate any service the customer declines
- Perform Service – See *Service Standards and Pricing* – Section 3 for labor standards
-

End-of-Appointment Checklist

- Contact the customer and inform them their bike service has been completed
- Run through all the service performed

- Play back any particular issues customer stated and describe action taken to fix these specific problems
 - Highlight any discounts the customer received
 - Note in the WO any recommendations (service/parts) that the customer passed on.
 - Make sure to load picture on and set service reminder
-
- Close out the WO, finalize the appointment on BeeLink (see *Using the Mobile Syllabus* – Section 7)
 - Take payment (see *Taking Payment* – Section 7)
 - If the when customer expressed a particular concern about their bike prior to service, follow up with customer 2-4 days after the appointment to confirm the service met or exceeded their expectations.

End of Day Checklist

Mobile Bike Shop

- Plugged in for charging (if inverter shows battery voltage of less than 12.0)
- Floor swept
- All product secured to walls
- Tools in correct place
- Sufficient fuel in tank for next day's appointments

Work Orders

- All WO from the day are closed out (see POS - Section 7)
- Remove any remaining unused WO from the day
- If a bike remains with mechanic overnight, follow up with customer regarding status and ETA
- Issue invoices

Customer Bike info double check

- Ensure pictures are loaded for each bike
- Ensure next recommended service is set for each bike

Syllabus double check

- Ensure appointments are tweaked to reflect actual time and number of bikes during appointment
- Appointment marked "done" as appropriate

Cash Box/Register

- Register is closed out and reconciled
- Cash box has sufficient change for the next day
- Deposit any checks with bank's mobile app

Special orders

- Submit any special orders

Weekly Checklist

- Check inventory errors in POS
- Deposit physical checks that weren't able to be deposited with the mobile app into bank account.
- Review weekly restock order on day reorder arrives from Beeline Support [customized day for each mechanic]
 - Adjust restock levels, quantities and items as appropriate in POS inventory
- Review Weekly payments report
- Review Royalty statement and record activity
- Follow up any outstanding invoices
- Categorize expenses
- Review upcoming 2 weeks appointments on web dashboard Appointment Calendar and look for opportunities to optimize the schedule by adjusting appointments (in consultation with customer) and/or fillers.

Monthly Checklist

- Conduct inventory count of Mobile Bike Shop and reconcile inventory(See Section 4)
- Complete monthly bookkeeping activities (See Section 8)
- Submit Monthly Financial Report (See Section 8)

Section 3 – Mechanical Service Standards & Pricing

Note: Specific prices and rebates contained in this document are subject to change. Current pricing, discount and rebate information can be found at the Beeline Bikes website: (<https://beelinebikes.com>)

Beeline Bikes Service Guarantee

Beeline Bikes guarantees all service provided for a period of 30 days. In order to provide excellent customer satisfaction during customer follow up visits.

- After a customer has contacted Beeline with an issue/complaint:
 - The Mechanic responsible for the work should contact the customer in a timely manner, no later than 1 business day, in order to schedule a follow up service
 - The Franchise Owner or Lead Mechanic should make a time available within one week of the customer's issue/complaint contact
- Please be conscious that “user error” is often not the fault of the customer.
 - We intend to reasonably educate the customer on how their machine and works and what are reasonable expectations
 - Many follow-up visits may be avoided by taking the time to provide this better level of customer service during the first appointment and documenting recommendations that the customer passed on.

Tools

Minimum tools required

- Mechanic must maintain the Required Minimum Tool Package (See *Appendix D - Minimum Tool List*) to perform all normal bicycle service repairs
- Used tools must be in good working condition

Additional enhanced service tools

- All tools in excess of minimum requirements and intended service standards, should only increase the range of service
- Any additional tools or equipment cannot negatively impact the Service Standards for a service appointment

Beeline Bikes Core Services

Full Tune-Up

The goal of any Beeline Bikes Full Tune-up is to correctly identify what service the bicycle needs and to fix it completely without need for follow-up service.

- When the situation arises that a part could be replaced but doesn't technically have to be replaced, suggesting replacement is often the best course.
- Most Beeline customers are not familiar with inspecting a brake pad, tire, cable, etc. on any regular basis.

TIP: It may be helpful to imagine your customer is about to embark onto cross-country bicycle tour and has zero knowledge about bicycle maintenance.

- A Full Tune-up is competitively priced at \$79.99, but may change or be reduced for special customer situations, corporate accounts, or limited time offers
- Step-by-Step guide to a Full Tune-Up:
 - Put bike in stand
 - Fill out Work Order with bicycle info
 - Assess bike, putting notes into WO regarding everything the bicycle needs
 - Take photos of particularly unusual or damaged items before any work is done
 - Give quote to customer
 - Make note in WO of any parts/labor customer declines
 - Look at new parts to be used
 - Cut chain
 - Remove wheels
 - Remove tires now if they are going to be replaced
 - Check Bearing adjustment
 - Check lock ring torque
 - Briefly wipe down wheels in true stand
 - True wheels
 - Install tires so that inner tube valves line up with tire label
 - Pump tires
 - Wipe down/clean frame
 - Install wheels
 - Adjust rear brake
 - Adjust front brake
 - Align Derailleur hanger
 - Adjust rear derailleur

- Install chain if needed
- Double check rear derailleur low limit screw
- Check chain length by shifting into largest chainring and largest cog
- Adjust front derailleur
- Check bolts for proper tightness
- Lube chain
- Add any accessories
- Take bike off stand
- Check stem and saddle straightness
- Check brake lever and shifter angle
- Check headset adjustment
- Test ride bike
- Reinstall bike into stand
- Fix anything that test ride showed
- Recheck wheel trueness
- Reinstall any accessories that were removed during tune
- Take picture of finished bike, drive side
- Select recommended service interval
- Contact customer to finalize payment and playback how the Tune went

Typically Beeline Bikes does not charge for additional labor to install the following products with purchase of a Full Tune-up:

- Tires
- Chain
- Cassette
- Brake pads
- Saddle
- Wireless computer
- Bottle cage
- Kickstand
- Grips
- Clip-on lights
- Pedals

Single Speed and Kids Bike Tune-Up

Single Speed and Kids Bike Tune-ups are competitively priced at \$59.99, but may change or be reduced for special customer situations, corporate accounts, or limited time offers

The process for Single Speed and Kids Bike Tune-Ups are the same as Full Tune-up less the adjustments to derailleurs.

New Bike Build (and Delivery)

New Bike Build (and Delivery) is competitively priced at \$99.99

- Bicycle is assembled in normal fashion with the following considerations and require a second mechanic safety check

New Bike Build for Kids Bikes 12”-24”:

- Freewheel pulled and threads greased, freewheel re-installed
- Spoke protector remains on bike
- All bolts greased (stem, water bottle, quill, axle bolts)
- When applicable, install training wheels with wheels 1” off the ground on each side
- Reflectors installed
- Stem at highest position
- Seat post at highest position
- Saddle angle flat
- All protective packaging removed

New Bike Build for Adult Bikes (price point below \$1,499.99):

- Pull crank and bottom bracket, grease threads and reinstall
- Cables pre stretched and readjusted
- Derailleur hanger straightened
- Cassette removed, splines lightly greased, reinstalled
- Leave spoke protector on
- Bolts greased (stem bolts, water bottle bolts)
- Do not grease bolts that will be used for racks
- If rack is installed use low strength Loctite on these bolts
- Reflectors installed
- Stem at highest position, angled up

- Seat post at highest position
- Saddle angle flat
- All protective packaging removed (little grey sticker on road calipers, clear plastic on front derailleur, etc.)
- Finish road bike bar tape with single width black electricians tape. Ends on underside of handlebar
- Disc brake pads burned in during test ride
- Presta valve caps and nuts removed

New Bike Build for Adult Bikes (price point above \$1,500.00):

- Same initial build as the adult bike build above plus:
 - Pull fork and grease headset bearings
 - Remove spoke protector
- Mechanic will review and include a New Bike Delivery Check List for all builds and deliveries
- Set Customer Saddle Height

Additional Labor Offered

à la Carte Services	
Flat Tire Fix - \$9.99 [‡]	
Small (any 2 items below) - \$19.99 [‡]	
Medium (any 4 items below) - \$29.99	
Large (any 8 items below) - \$49.99	
Counts as One Item	
<ul style="list-style-type: none"> • Installation of chain, cassette, brake pads, saddle, wireless computer, water bottle cage, kickstand, grips, lights, pedals, and tires <p>(above items included in Tune-Up)</p>	<ul style="list-style-type: none"> • Component adjustment (derailleur, brake, saddle, etc.)
	<ul style="list-style-type: none"> • Handlebar tape installation
	<ul style="list-style-type: none"> • Minor wheel true
	<ul style="list-style-type: none"> • Rear rack installation

• Stem installation	• Derailleur hanger alignment
• Basket installation	• Individual cable/housing installation
Counts as Two Items	
• Spoke replacement	• Hub overhaul
• Chain-ring installation	• Wheel replacement
• Headset overhaul	• Bottom bracket/crank installation

‡ \$29.99 service minimum per visit

Additional Service Prices

- Assemble and tune from box (includes removal of packaging materials) - \$99.99
- Disassemble & pack for shipping (includes boxing materials, \$20 discount if travel case provided) - \$99.99
- Bike fit (consultation with saddle adjustment, knee angle analysis and cleat positioning) - \$79.99
- Suspension service - \$89.99+
- Custom wheel building - \$99.99
- Custom build (parts purchased from Beeline Bikes) - \$199.99+
- Custom build (customer-purchased parts) - \$299.99+

Additional Services Requiring Certification from Beeline University

- Glue tubular tire, includes glue - \$99.99

Pricing Guidelines

- Beeline Bikes follows minimum advertised price (MAP) pricing guidelines. Mechanics may not advertise any product for a price less than the MSRP specified in Beelink.
- If a customer qualifies for a more than one type of discount, only one discount, the discount resulting in a lower price for the customer, will be applied
- We automatically apply Standing Discounts (as shown below)
- We apply discounts based on promo codes if the promo code is attached to the appointment (and thus shows up on the syllabus)
- Corporate direct-pay pricing applies at a corporate customer's home or office
- Discount pricing for products or services beyond standard rates are at the discretion of Franchise Owner.

Beyond any typical discounts that will be listed on the Syllabus, it is the customer's responsibility to inform the Franchise Owner or Lead Mechanic of any corporate discount they may qualify for at which company they work.

Standing Discounts include the following:

Multi-bike Discount:

- \$10 off each Tune-Up with 2 or more bikes in a service visit
- Any combination of tune-ups (Full, Kids/Single Speed, or Pro) will trigger this discount
- To apply this discount: Add offsetting \$10.00 credit to each bike's WO.

10% Parts Rebate

- 10% off parts and accessories with a tune-up
- This discount applies with a Full, Kids/Single Speed, or Pro Tune-Up
- This discount does not apply to a la carte labor
- To apply this discount: Add a 10% line-item discount to each qualifying part/accessory on the WO or sale.

Customer Type Discounts:

- These are automatically applied by the POS when customer type is selected:
 - Investor/advisor: 25%
 - Mechanic: cost +10%
 - Beeline *Black Card* holder: 15%
- Customer type is indicated next to the Customer's name in the POS.

Promo Codes:

- Amount of discount and application of promo code discounts in the POS may vary from month to month.
- Promo codes are visible in the promo code manager on the mechanic dashboard. (see *BeeLink Dashboard* – Section 7)
- When a customer enters a promo code at signup, that promo code will be reflected on the customer’s appointment details. (see *Using the Mobile Syllabus* - Section 7)

Referral Credits:

- Consumer referral credit is equal to \$15.00 and is awarded to the referring customer when the referred customer completes a service appointment with Beeline Bikes.
 - When a customer has existing referral credit on their account, the amount of credit earned and available to spend will be reflected on the BeeLink Syllabus. (See *Using the Mobile Syllabus* -Section 7)
 - To spend the referral credit, add the corresponding Credit SKU to the referring customer’s WO during their next service appointment.

Corporate Pricing: Direct Pay

- Service paid for by the bike owner (customer/employee/student)
- Full Tune-Up is recommended at \$59.99 (\$20 off normal price)
- Kids/SS tune-up is recommended at \$49.99
- Pro Tune-up is recommended at \$109.99

To apply these discounts, scan the appropriate tune-up SKU, and an offsetting corporate credit SKU.

- 10% off parts, accessories and a la carte labor (Flat Fix, Small, Medium, Large) – apply appropriate line-item discount.

Please note that corporate pricing applies to visits at the customer’s home as well as office, however multi-bike discounts do not apply since corporate prices have already been discounted

Corporate Pricing: Subsidized Service

- Service paid by organization (company/employer/campus)
- All “normal labor services” are paid for by the subsidizing organization, members of that group only pay for parts/accessories
- Add service SKUs as appropriate –
 - Use “100%Comp” line-item discount” for each service SKU when free normal labor is applicable

- Use “10% Off” line-item discount to each qualifying part/accessory on the Work order in the POS when a 10% off parts and accessories discount is applicable

Minimum Service Charge

This minimum service charge is only applicable for consumer appointments,

- Beeline Bike charges a minimum service charge of \$29.99 on all mobile consumer appointments
 - If the customer’s pre-tax total is \$29.99 or more, this minimum does not apply
 - To apply this charge when a customer’s pre-tax total is less than \$29.99 scan the minimum service SKU in the POS, calculate the customer’s subtotal, and then adjust the price of the minimum service SKU to arrive at \$29.99 for the total sale.

Gift Cards

- Gift Cards can only be Purchased from Beeline HQ.
- To complete a gift card purchase scan the new unused gift card into a work order in the POS
- Enter an amount equal to the customer’s payment amount to be pre-loaded on the gift card
- Confirm amount is correct and complete the transaction
- Gift card is now activated and ready to use with the loaded amount purchased by the customer

Section 4 – Inventory and Supply Chain

Setting inventory levels on your Mobile Shop

Baseline inventory is determined by the Automatic Re-ordering point and Automatic Re-ordering level. The Franchise Owner or Lead Mechanic have the ability to control exactly how many of each item you would like to stock on your Mobile Bike Shop

!! Warning: Be careful to change inventory levels on only your Mobile Bike Shop during this process. !!

- For a product already in the Beeline Bikes POS database:
 1. With “item search” find the specific product and go to the individual product page
 2. Find the “Automatic Re-Ordering” section
 3. Be certain to only change quantities in your Mobile Bike Shop
 4. Set “Re-order point” quantity
 - When your inventory quantity is equal to or less than the re-order point, the system prompts a reorder list which will bring your supply up to “level” quantity
 5. Set “desired inventory level” quantity
 - This is the inventory quantity the system will fill to when you are at or below the “re-order” quantity
 6. It is best to set your “re-order” column to one less than the “desired inventory level” column
 7. Click “Save” found in the upper left hand corner
 8. The third column “need”, indicates how many of that particular item are needed to bring the Mobile Bike Shop supply up to your set “desired inventory level” quantity
 - Said another way, the “need” quantity is your “level” quantity less your actual quantity on hand

For a product not in the Beeline Bikes POS database Complete an online Special Order Form found on the Dashboard. When product is ordered, it will be put into the Beeline POS system. Beeline Support will notify you when product is being processed and of the estimated ship/arrival date

Resupply Procedure

The mechanic is responsible for maintaining inventory levels on their Mobile Shop. This includes setting and maintaining min/max quantities of all items considered “normal inventory” for the particular Mobile Bike Shop

Resupply will be done one of two ways:

- Either automatic order based on the reorder list on the mechanics specified re-order day (“Order Day”)
- Alternatively, the mechanic may choose to submit their order themselves on their Order Day
- If no order is placed by the cutoff time of 4:00pm Pacific Time, an automatic reorder will be placed.
- Set minimum/maximum quantities for all items on Mobile Shop
- Maintain a minimum of \$9,000 of inventory COGs

Resupply Timeline

- Day-of-week subject to change at Beeline’s discretion
- Order Day (Monday currently)
 - Order is placed automatically or manually by the franchisee
 - Order must be in by 4:00 PM Pacific Time on the Order Day.
 - Order is put into a Sale from Beeline Distribution to Franchisee
- Ship day (Tuesday currently)
 - Resupply items are boxed and shipped via ground service
 - Actual shipping charge is determined and put onto Sale
 - Sale closed out on Franchisee account when items are all physically in boxes
 - Receipt of sale is printed and included with items.
 - Receipt of sale is emailed to Franchisee
- Receiving order (Wednesday currently)
 - Create Purchase Order (“PO”)
 - Enter all items into PO
 - Receive items into inventory
- Product on Mobile Bike Shop ready to sell for morning appointment (Thursday currently)

Restock time line* subject to agreement with franchisee

Monday	Tuesday	Wednesday	Thursday	Friday
		12 P.M. last call for Special Orders (SO)	Beeline DC orders SO from west coast distributors	Transit time for Beeline Order
Beeline DC receives Mechanic PO in by 4 P.M.	Beeline DC confirms PO, packs & ships PO and SO		Restock order and SO on Mobile Bike Shop ready to sell.	

Return policy for mechanic to Beeline Distribution

The mechanic may return an item to Beeline Distribution when a Return Authorization Number (RMA#) is obtained from Beeline Distribution less than 30 days after the mechanic has received the product.

In the case that the mechanic received a faulty product, a replacement product will be sent to the mechanic on the weekly resupply shipment following the date that Beeline Distribution receives back the faulty product. The mechanic will not be charged a restock fee, but is responsible for any shipping charges back to Beeline Distribution. The determination of a faulty product is at the sole discretion of Beeline Distribution.

In the case that the product is not faulty, the mechanic will be issued a credit towards their account, less a 15% restocking fee, once Beeline Distribution receives the returned product.

In no case shall a mechanic return a bicycle or bicycle frame without prior written approval of Beeline Distribution.

Special Order Process

Beeline enables Mechanic to place Special Orders (SOs) in order to meet the varying needs of customers. Depending on the item, a SO is either shipped from Beeline DC inventory stock or is ordered from one of Beeline's suppliers. In all cases, SOs are shipped from Beeline DC to Mechanic.

Working steps for creating special order

- Determine the part(s) you need
 - If you don't know which part, contact Beeline Support for assistance
- Complete an online Special Order Form found on the Dashboard including:
 - Rush delivery indication
 - Franchisee ID
 - Customer name
 - POS Work order number
 - Part number and description
 - Amount of deposit taken
 - Notes when appropriate
- Submit Special Order to Beeline Support
 - Beeline Distribution will confirm with Mechanic that product has been ordered and the estimated shipment date if not in accordance with the re-stock schedule

Deposits

Beeline Support suggests taking a 50% deposit prior to placing a special order.

Special Order Timing

Monday	Tuesday	Wednesday	Thursday	Friday
		3 P.M. last call for Special Orders (SO) that require shipment 3 rd party supplier	Beeline HQ orders SO	Transit time for Beeline Order
5 P.M. last call for SOs in Beeline DC inventory	SO added to restock order Restock order boxed/shipped to mechanic	Mechanic receives product by end of day	SO on Mobile Bike Shop ready to sell	

Product Warranties

All warranty claims are at the discretion of the manufacturer AND Beeline Distribution.

- Warranties extend to the original owner with proof of purchase; bank statements are not accepted as proof of purchase
- Contact Support to find out what a given vendor's warranty is
- Contact Support with warranty request and submit information requested as outlined below.
- Customer satisfaction is of paramount importance to CLTV (see section 5 Selling Techniques), and mechanics are encouraged to use their discretion when assessing warranty claims.
 - **Considerations:**
 - It is often better in the long term to replace a low price point product for free for a customer than to save money in the short term by denying a warranty replacement.

Product Purchased from Beeline Bikes:

- Mechanic must assess the prospective warranty product to determine if the issue is a warranty qualifying failure and review the related product receipt.
- Subject to Beeline Distribution pre-approval, Beeline Bikes Bikes warranty product sold by Beeline Bikes
 - This does not include additional parts that may be required to replace warranted part
- Any Beeline Bikes Mechanic must honor a legitimate warranty of a product purchased from any Beeline Bikes store
- The customer is responsible for all shipping charges (both ways), labor, and any additional parts that may be required to replace the warranted part.

Product not purchased from Beeline Bikes:

Beeline Bikes does not warranty product purchased elsewhere. However, the Beeline Bikes Mechanic may choose to process a legitimate warranty of a product purchased elsewhere as long as the following criteria are met:

- Customer has proof of purchase as the original owner. Bank statements are not accepted as proof of purchase.

- Product is within the manufacturer's warranty period and adheres to manufacturer's description of a warranty failure
- Customer is responsible for all shipping charges (both ways), associated labor, and any additional parts that may be required to replace the warranted part

NOTE: Warranty processing is much like taking a special order, except old product must be either field destroyed or sent back to Beeline Distribution for evaluation in accordance with Beeline Distribution's sole discretion.

Steps for Warranty Claim

- Contact Beeline Support if there is a question about a product being under warranty
- Information that the Mechanic will need to provide includes:
 - Current Date (required)
 - Purchase date as shown on proof of purchase
 - Customer Name (name of customer needs to match name on proof of purchase when applicable)
 - Place of original purchase
 - Franchise ID
 - Work Order #
 - Item description
- Date of follow up appointment scheduled
- If product is under warranty with Beeline Bikes, Beeline Support will provide an RMA#
- Box the used warranted product and ship product to Beeline Support
- Include a physical copy of the original proof of purchase if an electronic copy is not provided
- Beeline Support will process the warranty with the appropriate manufacturer
- Replacement warranty product will be sent to the franchise owner or lead mechanic with the weekly resupply order

Product Recalls

Product is purchased from Beeline Bikes and is recalled:

Beeline Bikes and/or the manufacturer cover the replacement part, shipping, and labor regardless of time since product was purchased.

Product is not purchased from Beeline Bikes and is recalled:

Subject to Beeline Distribution pre-approval. If approved customer will pay for shipping, labor, and any additional parts needed to fix the recalled product

Inventory Counts

Periodically the mechanic should execute an inventory count and reconciliation. This step helps the mechanic ensure that:

1. Beeline DC recommends that Mechanic complete an inventory count at least quarterly
2. Before commencing count, insure that:
 - o All items are in the correct place and tagged correctly
 - o The inventory in the POS is accurately reflecting the product actually in possession of the mechanic.

Inventory step-by-step

Inventory counts are conducted in the POS system

1. Start a new inventory count, titled with the date of the inventory count
2. Scan every SKU on the Mobile Bike Shop and in Mechanic storage (as applicable)
 - TIP: inspect product for mislabeling and/or damage at this step
3. Check the list of missed items and correct mistakes
4. Check the overage and underage counts and investigate / correct any mistakes
5. Reconcile inventory (this results in an adjustment to your inventory to the actual counts).

Bike Fulfillment

The following steps describe the process for fulfilling bicycles, namely Accell North America (ANA) brand bicycles, purchased online by a customer.

- Bicycle is shipped directly to Operator's commercial ship-to address.
 - See Email Notifications below
- Operator promptly picks up, builds, tunes, and test rides bicycle (reference Section 3, Beeline Bikes Core Services for detailed build process).
- Operator checks "Purch Order Number" on packing slip (attached to bike box) to verify which customer and appointment bicycle belongs to.
 - Purch Order Number is visible from Appointment Calendar (hover function), Appointment Details, and Delivery Reports on BeeLink system.
- Operator delivers fully-built and tuned bicycle including all instructions and/or manuals at time and date specified by the customer.
 - If an earlier delivery date can be accommodated, Operator reaches out to customer to edit appointment for earlier date/time approved by customer.
- During the delivery appointment, Operator aids customer with fit, proper operation, and maintenance information.
- Operator marks appointment "**Done**" in Syllabus to finalize appointment and receive payment

Email Notifications

Operators will receive system generated alert emails when the following actions have taken place:

- Customer purchases a bicycle(s)
- Bike Shipped (includes tracking #)
- Appointment scheduled
- Appointment marked "Done"

Damaged Bicycles

If a bicycle arrives damaged, regardless of degree of damage, Operator must take the following action immediately:

1. Document any/all damage with notes and pictures of damage in Work Order and customer's profile on Beeline website.
2. Communicate issue(s) and resolution to Beeline Support.

Additional steps for escalating degrees of damage (a., b., c., and d.).

- a) If the bike is damaged in a way that makes it not "new" but is otherwise perfectly functional and safe:
- Operator must show the customer any/all damage so customer can document and contact ANA to receive a credit.
- b) If a part or component is broken or damaged, but easily fixable with additional parts (in-stock on mobile shop) and/or labor:
- Operator creates a separate Work Order with Accell North America as customer.
 - Add all additional parts and labor needed as well as detailed notes to Work Order.
 - Use "to be invoiced" as method of payment.
- c) If damages require more than \$40 of additional parts and labor:
- Operator must receive approval from Beeline HQ in consultation with ANA as to the best solution.
 - Beeline HQ reviews and approves all documentation before invoicing ANA.
- d) If the bike is damaged beyond ability to fix and will require a second bike shipped:
- Operator contacts Beeline support.
 - Replacement bike will be shipped directly to Operator ship-to address with a return shipping label included.
 - Operator boxes old damaged bike, affixes the ANA supplied return shipping label, and informs customer to schedule pickup.
 - Operator builds and delivers new bike to customer. Customer pays a discounted build fee at time the new bike is delivered.
 - Beeline Operator invoices ANA \$99.99 for boxing labor.

Section 5 - Best Practices and Customer Service

Scheduling

BeeLink's scheduling functionality allows customers to book service appointments with Beeline mechanics.

Schedule Management

Beeline mechanics can manage the hours their particular vehicle is open for booking using three main tools:

1. **System available hours.** These are the default days/hours that the system considers a Mobile Shop available for scheduling. Management of each shop's hours and days on/off are adjusted with calendar fillers.
2. **Day of Week Zip Code Support.** Owners can elect to support certain zip codes in their secondary territory on specific days of the week to enable coverage of a broader geographic area than would otherwise be feasible.
3. **Fillers.** These are the mechanism by which mechanics make their Mobile Shop unavailable for general booking for a specified time period. Please refer to Section 7 for more on how fillers are created and updated.

Schedule Requirements:

A mechanic's Open Time is defined as their Mobile Shop's System Available Hours minus the number of those hours blocked by Fillers.

- Mechanics must maintain a minimum Open Time of 40 hours per each week (Monday - Sunday).
- Fillers must be added to the schedule a minimum of two weeks prior to the date the filler will impact.
- Booked corporate appointments count towards a Mobile Shop's Open Time calculation.

While two weeks out is the cutoff, Beeline Support recommends mechanics add fillers to their schedule as early as is possible

Schedule Optimization

Beeline is designed to connect customers who have bicycle service and product needs with Beeline mechanics in an efficient manner in pursuit of two main outcomes:

- Allow the customer to get service and products easily and quickly, without having to take their bike(s) to a bike shop.
- Maximize the number of bikes a Beeline mechanic can service in any given period of time.

However, a mechanic usually has information the system doesn't, and using that information to optimize the schedule is a straightforward way to improve a vehicle's schedule optimization, and thus its profitability. Here are the main tools in a Mechanic's optimization toolbox:

- **Tweak Personal Appointment** – allows Mechanics to adjust certain aspects of individual appointments' standard scheduling algorithm. (See *Minor Appointment Adjustments Using "Tweak"* – Section 7)
- **Call Customer** and Request Schedule Modification
- Modify **Corporate/Group Appointment** – this allows the Mechanic to open up the Mobile Bike Shop for individual customer sign-ups that would otherwise be blocked

Monitor your schedule regularly to find any opportunities to optimize.

Auto-scheduling of travel time:

BeeLink allocates time for individual appointments based a number of factors, including the number of bikes to service.

- For individual appointments, the system accounts for some travel to the next scheduled appointment.
- For group/corporate appointments, the system **does not** automatically add additional travel time. What this means:
 - The appointment start time selected by the customer and reflected in BeeLink is the time the customer expects to meet the mechanic.
 - The mechanic should ensure their arrival time is early enough to accomplish any required pre-appointment activities before the appointment's official start time, including parking, mobile shop setup, and pre-corporate/group appointment setup.

TIP – Do not assume the system has automatically provided enough travel time. Always take into account the following factors when assessing whether you need to manually extend a personal appointment or add time to a corporate/group visit:

- Distance between appointments
- Estimated time for service
- Traffic patterns
- Time of Day

- Other local conditions
- Set up

Extra time for the Unexpected

Route planning and traffic conditions are inherently unpredictable; so Mechanics are encouraged to build in extra time in addition to estimated travel/setup time to account for unforeseen delays.

Unable to Complete Service On-Site:

While the Beeline Mobile Shop is equipped to handle a wide variety of bicycle service situations, and to provide solutions for as many types of service needs as possible, there will be instances where service cannot be completed on-site. When this occurs:

- Set the customer's expectations as soon as you know there will be a delay in service completion. Explain the issue, the possible solution(s), and the timeframe for executing solutions.
- Take the bike with you, or schedule a time to return to the customer and complete service
- Perform return visit and complete service.

Customer Interaction

Email and Phone Communications.

Unlike traditional bicycle shops, Beeline Bikes relies on email and text messaging in addition to traditional phone calls to maintain open, accessible lines of communication with customers. This means mechanics must remember to remain mindful that every communication with a customer is important, regardless of medium. Records of digital communications often persist indefinitely. Also, mechanics and Team Managers are cc'ed and bcc'ed on some customer emails. Please be aware of this when reading or replying to emails.

BASIC RULES:

When writing anything related to the delivery of Beeline service, write as if your message will eventually be heard or read by a customer. Regardless of whether your message is in an internal note, a WO note, an email to the customer, a note to Beeline Support, or to a fellow mechanic.

In person

- When talking with a customer, identify yourself as “[your name] with Beeline Bikes.”
- A friendly, calm, and positive tone of voice will help make you be more approachable. Remember that you are at the customer’s home/office and are in many ways a guest
- Body language also plays a critical role in how the customer views you. Be open and accepting; don’t cross your arms

Talking on the phone

- Never talk on your phone while driving
- When talking with a customer, identify yourself as “[your name] with Beeline Bikes.”
- Your language should be positive. Talk about what you can and will do, not what you cannot do.

Emails to customers

- When responding, be considerate of everyone on the email thread. Look at who is copied, determine whether you want to “reply all” or just reply to one recipient.

- If you are replying to a customer service issue, copy the appropriate customer service email alias. This tracks the customer issue in the back-end customer management system.
- Lead the customer to the website when discussing an appointment
- Paste a link into the email so the customer only has to click to signup

Texting a customer

- Only use this form of communication when customer has given approval
- Never text while driving
- Always identify yourself by name and “with Beeline Bikes” in the text message. Most customers will not have your number programmed into their phone.

Addressing a customer complaint (on phone, in person, or via email)

Respond to all customer complaints within 1 business day hours of the customer’s communication. Handling a customer complaint needs to have a personal touch, but using the following 4-step format will help guide you:

1. Play back the customer’s issue, complaint, and/or concern.
 - “I’m terribly sorry that you are still experiencing the creaking noise.”
 - “I apologize that I was late for our appointment.”
 - “I am sorry that you had another flat tire in such a short time frame after service.”
2. Identify and communicate the underlying issue. Without making an excuse, describe the difficulties involved with solving the issue
 - “We’ve been seeing more creaking issues with the BB30 systems than some others. I am not certain but it may be related to the bottom bracket.”
 - “I chose my route poorly and it caused me to be late. I take full responsibility.”
 - “I see from my notes that I suggested a new tire that had more puncture protection because your current tire is very thin. I also show that you declined the new tire at that time.”
3. Discuss what future action you will take and add something of value to the customer.
 - “I would love to find a time that works for you to come back out and address the creaking. This is something that I should have addressed during the Full Tune-up so there will be no charge to you for my follow up visit.”
 - “Even though I was late I will still be able to finish your Full Tune-up within the hour. I will also take off 10% on the price of your tune for your inconvenience.”
 - “I am happy to come back out for a follow up visit and fix your flat tire. I will need to charge you for the parts and I am going to suggest we replace that worn out tire to help prevent future punctures.”

4. Lead the customer to another appointment

- “My schedule is fairly tight this week but I want to get your bike fixed as soon as possible. How does your Wednesday evening look? Or I could fit you in on Friday between 11 and 12. If it is easier, you can also select your own appointment at beelinebikes.com.”
- If a follow up appointment is not scheduled, follow up with the customer after no more than two days. Once the customer makes initial contact, the responsibility is on you to get the appointment scheduled. Don't let this slide!

Selling Techniques

Customer Life-Time Value (CLTV)

The Beeline system enables mechanics to create valuable long-term relationships with customers. This is done primarily through your opportunity to have a 1:1 relationship and to become the “bike consultant & expert” to the customer. The time, effort and money spent finding new customers is returned many times over during your relationship with that customer. Based on Beeline’s average revenue per bike, a customer with 2 bikes which are serviced every 6 months, will generate \$2,500 in revenue and \$1,800 in service revenue and product margin over a 5 year time frame. And that is based only on service and parts and accessories sales. Eventually that customer may require a new bicycle and your relationship will put you in the best possible position to provide the customer the best solution.

It is critical then that in each customer interaction, you do your best to meet or exceed the needs and expectations of the customer. And what a head start you have - given the history of poor service experiences at many bike shops you have the advantage of convenience, competitive pricing, and 1:1 service.

Here are some guidelines to work by:

Do right by the customer, do right by the bike: The most successful mechanic listens to the customer and listens to the bike.

1. **Listen to the customer:** The customer is the expert for how they use the bike. Take the time to ask the customer how they have used the bike in the past, how they plan to use the bike, what specific issues they have experienced themselves. Remember the customer is the authority on all things relating to the customer’s experience.
2. **Listen to the bike:** As the mechanic, you are the expert for what the bike needs. Keep your standards high, aim to make every bike better than new at the completion of the Tune-Up. Remember, the customer requested the mechanic’s service because the mechanic is the authority on all things bike

Exceptional customer service comes from the combination of parts 1 and 2. Be sensitive to the customer’s expectations of quality, price, and timing.

If the customer and bicycle are contradicting each other, never compromise on the safety of the bicycle.

Consultative Sale – Not hard sale

- Provide options and recommendations based on the bicycle's needs and the customer's expectations.
- Explain the value to the customer for every service provided and every part sold
 - Example: Why we strongly recommend using new rim tape and a new tube when the customer purchases a new tire.

Go the extra mile...

If a customer has more bikes in the garage that they are not having you work on, offer a free assessment. The customer will appreciate it, and even if you don't get the work then, the customer is yours to lose.

You may be surprised by what customers know and don't know about their bike. For example, we've found that many customers are not aware that their front derailleur trims to avoid chain rub, offering a quick tutorial for certain customers goes a long way.

...and take credit for the extra mile.

Write in the WO service notes the extra things you have done. Use labor SKUs for any extra work and change the price to \$0.00. Show the customer they received valuable labor and expertise, even if they don't pay for it.

Validate the customer's experience!

When it comes to customer experience, the customer is the absolute authority. For example, if a customer has trouble with their bike's shifting performance, the shifting on that bike has failed to meet the customer's expectations. It is the job of (and opportunity for) the mechanic to meet and hopefully exceed these expectations. The mechanic may employ one or many of the following tactics:

1. Adjust the bike as it is.
2. Identify and explain to the customer any additional parts the bicycle may need to achieve the expectation of the customer.
3. Educate the customer about techniques they may employ to achieve the desired experience. When having this conversation be certain to take with empathy and understanding to the customer's point of view.

Upgrade vs. Repair

In the course of service on bicycles, there are instances where components on a customer's bike could be repaired or upgraded. If possible, an upgrade is usually preferable to coaxing a few more months of life from an aging part. Here's why:

- Aging parts are a gamble. Storage in unfavorable conditions, a lack of regular maintenance, and prior service by mechanics of varying skill levels all make trusting an aging part a roll of the dice.
- The chances of needing a follow-up service visit decrease when using new parts.
- New components benefit from trickle-down technology, and are often a step up from a high-end version of the same part from years ago.
- Providing the customer with a new replacement part is often a more profitable use of the mechanic's time with a similar cost to the customer.
- If a customer declines to upgrade parts despite recommendations to do so (and assuming the bike is safe to ride) please do the following:
 1. Note the existence of a worn out part on the WO notes and explicitly describe work performed on that part (if any)
 2. Note that the customer declined an upgrade.
 3. Take a picture of the part(s) in question and add to the customer's bike info in the Beeline system. (See *Taking a Picture* – Section 7)

Safety

While cycling comes with inherent dangers, a fundamental aspect of providing bicycle service to customers is to guarantee that their bike(s) meet a basic standard of safety and are not likely to be dangerous to operate. If a bike is unsafe to operate unless it receives a level of service or repair, explicitly inform the customer of this fact, showing the customer the specific safety concern.

Document the issues.

- Describe the safety concern in the WO service notes and document that the customer has been informed of these issue(s). Remember that all your notes are visible to the customer.
- It is also a best practice to document specific safety concerns with photographs of all safety issues and loading the photo into the customer and bicycle's profile.

A photo with accompanying notes of high quality should minimize the chances of a "he said, she said" exchange with the customer. (see *Taking and Uploading a Picture* – Section 7)

Driving and Parking

A main component of performing Beeline service is driving the Mobile Shop to, from and between appointments. Remember that you and your vehicle are representing the Beeline Bikes brand. Please adhere to the following guidelines when operating the mobile shop

- Do not tailgate. Be patient. Maintain proper space with the vehicle in front of you. According to studies, the most common vehicle driver collide with is the one in front of them, due to tailgating. Large vehicles take longer to brake and stop.
- Signal early when approaching an intersection, giving other motorists ample warning of your intended direction.
- With so many blind spots on a large van, minimize lane changing when possible. Check your side mirrors at least once every 10 seconds.
- Give your vehicle ample time and space when slowing down for a complete stop. Use brake lights early. Most motorists don't realize how long it takes for a larger vehicle to stop.
- If you must idle the vehicle, keep windows closed to avoid prolonged exposure to fumes.
- Avoid idling while sleeping, loading, or unloading.
- When pulled off to the side of a road, highway, or Interstate due to mechanical problems, always use flashers, reflective triangles, and even road flares to alert approaching drivers.
- Always have tire chains at the ready, especially when driving in mountainous regions.
- Try to maintain a full fuel tank in winter driving to prevent water condensation from building in the fuel lines.
- Maintain additional space with the vehicles in front of you when driving in rain or snow.
- Operate below the posted speed limit when driving in wintery conditions.
- Exercise caution when approaching bridges in wintertime. Bridges freeze faster than roads, creating difficult to detect black ice.
- Slow down in work zones. Close to one-third of all fatal work zone crashes involve large rigs. Plus, you could lose your driver's license if caught speeding in a posted work zone.
- Don't fight eye-fatigue. Especially at the end of a long day with multiple stops, pull off the road and take a nap. The consequences of falling asleep at the wheel are usually catastrophic.

Vehicle Maintenance

The following guidelines should be followed to ensure that the Beeline Mobile Shop has the best chance to remain in good working order.

- Perform service on the mobile shop according to the vehicle manufacturer's recommendations.
- Set up procedures to check your mobile shop's oil, water, tire pressures and general cleanliness on a monthly basis, then record the inspections
- Retain a maintenance schedule and complete a new entry each time mobile shop is serviced in any way
- Following the maintenance schedules in the vehicles' manuals
- Perform a visual inspection of your mobile shop on a regular basis. If found, rectify faults as soon as is practicable.

Vehicle Appearance

Wrenching on bikes can be dirty. While a mobile shop operator can minimize the aftermath of a full service day to a certain extent by keeping a clean working area (and straightening up as they work), there will always be some cleanup work needed.

The Standard: The Beeline Mobile Shop should be clean, presentable, and inviting to customers. The exterior of the Mobile Shop should be washed on a regular basis, and the interior should be free of clutter and miscellaneous items.

- Sweep the mobile shop each night
- Vacuum the mobile shop as needed, at least once per week.
- Sell product with packaging in worst condition, so remaining product on the Mobile Shop is more visually appealing

Attire and Personal Appearance

The purpose of Beeline's personal appearance standards is to maintain a professional image and convey a high level of service when representing Beeline Bikes.

When operating the Beeline Bikes Mobile Shop, Mechanics are expected to use common sense and good judgment in order to meet the goals of this policy.

Generally, Mechanics should wear appropriate clothing, observe high standards of personal hygiene, and dress and groom themselves according to the requirements of their positions. The examples below are considered appropriate attire when performing service on the mobile shop.

- Any Beeline attire: Hat, beanie, hoodie, t-shirt etc. (excluding the Beeline Bike Kit)
- Closed toe shoes
- Clean pants, jeans, or shorts without stains or holes

Generally, when operating the Mobile Shop, Mechanics should maintain a clean and neat appearance and should refrain from wearing stained, wrinkled, frayed, or revealing clothing to service calls. Franchisees are urged to use their discretion when determining what is appropriate to wear when representing Beeline Bikes.

Respect for Work Environment:

Overall, performing service on the Beeline Mobile Shop differs fundamentally from working in the service department of a bike shop because the Beeline mechanic is a guest at their customer's home or businesses. In addition to being a much more inviting and convenient customer experience, this dynamic means Beeline mechanics must keep certain things in mind when performing service.

- **Music while working** – Keep music at an appropriate volume and take care to ensure choice of music doesn't include inappropriate or offensive content.
- **Blocking Driveways** – Make sure when parking the Mobile Shop that residence or patrons of a business where you are performing service are able to use their parking facilities as normal, and that you are not impeding access.
- **General Mobile Shop Etiquette** – When conducting bicycle service in the Mobile Shop, Mechanics are publicly visible representatives not only of Beeline Bikes as a whole, but of their own businesses.

Section 6 – Marketing

Brand Marketing

Branding is marketing strategy used to generate or influence a perception of, and thus a response in relation to, a product or company

The power of perception (a brand) can positively influence buying decision/s by:

- Creating an affinity or emotional connection with the consumer
- Providing justification for paying a premium price for a service or product
- Creating loyalty to the product or organization
- Demonstrating the quality and benefits of a service or product and the company behind it

The brand goal for Beeline Bikes is to attract loyal customers who are happy to pay a fair price for quality, convenient service.

BeeLaunch

Critical to the success of each mobile shop is the 13 week BeeLaunch grand opening program. The BeeLaunch program includes brand building goals and resources. Each week, during the 13 week program, will set out specific goals to acquire customers and build the business.

The BeeLaunch program is intended to build the foundation of a profitable business. Initial review of the BeeLaunch program will occur during the in person training portion of Beeline University. Additional communication will occur in the form of weekly email updates and weekly calls.

National and Regional Marketing:

- Beeline Bike Franchising will utilize the franchise marketing fees paid by the franchise owners to create, launch and track performance on national and regional advertising and marketing campaigns that are focused on brand awareness and driving customer traffic.
- As a franchise owner, you will benefit from the national campaigns and may be offered participation in additional regional and local campaigns. Additional costs may be involved if Beeline Bikes Franchising determines an additional cost to the franchise owner is warranted.

- Additional marketing materials, signage, point of purchase, or other may be made available and offered by Beeline Bikes Franchising to franchise owners contingent on the then current brand marketing efforts.

Campaigns and offers

- From time-to-time Beeline Bikes Franchising will conduct marketing campaigns affecting some or all supported service areas. Beeline will inform franchisees about such offers, and franchisees must honor these offers as long as offers are valid.

Local area Marketing

Local awareness happens through a variety of approaches and prices. Remember that you have a permanent billboard to drive customer your way – depending on your market, traffic and time on the road, over 25,000 potential customers may see your Mobile Shop every day you are out.

TV, Print and Radio ads are expensive, so Beeline recommends focusing on lower cost alternatives. A list of advertising techniques and venues is follows:

Techniques/venues:

- Print
- Radio
- TV
- Social Media posts
- Social media advertising
- Local bike blogs
- Direct mail
- Sponsorships
- Volunteer time by booking safety-check visits in conjunction with local events

Strategy and schedule

- What: Local area marketing uses built-in advantages of Beeline Mobile Shop in order to drive customers visit the Beeline website and book service appointments
- How: Through various channels, communicate the message that Beeline service is easy to use, saves time, and is convenient and a much better customer experience than having to drop a bike off at a bike

Marketing calendar

- Beeline Franchising creates a comprehensive schedule of social media posts across mediums, and works with the franchisee to create and post individual-focused content.
- Franchisees can use a recommended template for local posting, or craft their own plan in collaboration with Beeline Franchising.

Marketing Materials

Tools

- Branded 10x10 tent
- 4-6 foot table
- Branded tablecloth
-
- Signage holders on Mobile Bike Shop
- Generic Beeline cards
- Business cards
- Sandwich board with sign

Advertising and Offers

Beeline Franchising will periodically create advertising collateral for display on Mobile Shops. Franchisees are required to display such collateral per instructions provided with the material for specified amounts of time. This material will be shipped at regular intervals to franchisees.

Corporate Accounts

Beeline has dedicated substantial resources toward developing a system that enables Beeline Mechanics to acquire customer through companies in their service area. Cultivating a corporate clientele can be crucial part of a successful Beeline franchise. Corporate business has a few built-in advantages:

- A single visit has the potential to become a recurring relationship, with pre-scheduled visits at regular intervals
- An average corporate appointment yields more bikes than an average consumer visit.
- Internal marketing done by a company on behalf of Beeline usually provided at no cost

Techniques

- See Appendix E for detailed Corporate Account process
- Receive inbound leads from Beeline Franchising sales team
- Connect with local facilities and HR manager and provide them with the Beeline corporate onboarding package
- Provide a tour of your Beeline Mobile Shop to corporate contact
- You need the 3 Ps: Parking, Permission, Promotion
- Flexible pricing options (direct pay or subsidy)
- Make company a “Beeline Preferred Company” . i.e. give them a landing page in the system
- GOAL: book appointment, schedule recurring service. Once you’re in, it’s hard for them to say you can’t come back, especially if the employees appreciate the service and convenience.

Strategy and schedule

Once a mobile shop has performed service at a company, the goal is to maintain and cultivate the relationship with that company, usually through communication with the internal corporate contact.

TIP: Upon completion of a visit, send the corporate contact an email thanking them for a visit, attaching an invoice if necessary, and communicating the next scheduled visit.

Find Advocates

You'll find advocates that love your service in each company who are willing to help you spread the word. Cultivate these relationships and let them help you get the word out within a company that Beeline is offering a great service at the corporate location.

Social Media

Social Media is quickly becoming the most effective way to spread the word and create brand identity. For every rule there are exceptions but below are guidelines that will help increase the positive impact your social media will have. High Level guidelines are:

- Always keep it positive. Negative comments in any way only serve to damage your goals.
- Feed your friends, not the trolls. When you get social media trolls, it is best to ignore their comments. Reengage with friends of your brand
- No response is better than the wrong response. Don't take the bait to have a public argument, take it off line.
 - Refrain from criticizing the competition.
 - Question if it is your news to share. If you are relaying content you did not create, make sure it is appropriate for you to share.

Seek Engagement

Customers react poorly to being “shouted at.” Instead, seek posts, tweets, etc. that will engage your followers.

- Asking open-ended questions and creating dialogues increases your follower's engagement, the result of which will be greater exposure with higher quality.
- Great pictures of bikes and interesting bicycle related items often generates engagement
- Find your voice and know your purpose
- Consider if you will be using social media as a single voice, third person narrative, etc. Keep this consistent so your readers know how to expect your content.
- Your social media purpose is as simple as inspire, educate/inform, and connect

Create a social media calendar

Small and regular content posts are more effective than infrequent and large posts. Followers prefer to be fed bite size amounts of information on a regular basis. Making a social calendar will help you to keep to a schedule for regular postings.

Timing matters

When you post and to which channel makes significant impact on how many eyeballs will see it and potentially engage your message.

- **Instagram** - Statistics show that day of the week has little difference but posting during off hours is ideal. Between 5-6 PM works well. You can also sneak in a post during the lunch hours, 11-noon.
- **Twitter** – The best days to tweet are Wednesday through Sunday, with Saturday and Sunday being the best. 1-3 PM has proven to have the highest likelihood of retweets. Ideal character count is 71-100 characters.

Monitor and engage

Schedule time every day to look at social media, even if it is only 15 minutes. Respond to comments in a timely manner and be sure to “like” and “share” positive comments.

Measure your results

- As with everything, if you are not monitoring your impact, you don’t know how effective your efforts are and where you can be improving.

Content creation

Creating content on a regular basis may seem daunting but it doesn’t have to be. Most content is right in front of you, every day. Here are some ideas about creating new and exciting content for your followers.

- **Get pictures.** Posts with photos receive 39% more interaction than posts without photos.
- **Be concise.** Each format has some best practices but universally, a more concise message has proven to have more engagement.
- Subject matter ideas include featuring a favorite item of gear, your personal bike profile, service tips, custom builds you are doing, any behind the scenes stories, promote a local group ride, staff profile, highlight a great customer (with customer’s permission),

Section 7 – The BeeLink Platform

The BeeLink Platform consists of both a customer facing website as well as the backend dashboard used by the mechanic. BeeLink is built for both a desktop and mobile device experience.

- The customer facing side of BeeLink consists of the Beeline Bikes website which allows the customer to easily view available service appointment times, book a specific appointment time for one or multiple bicycles, manage their account, see past appointments, and view recommended next services for each bike.
- The Mechanic facing side of BeeLink consists of a dashboard that allows the mechanic to manage their service appointments, customer relationship manager (CRM), bicycle relationship manager (BRM), and manages corporate account appointments.
- The Point of Sale (POS) is a tightly integrated part of BeeLink, communicating with beelinebikes.com to maintain a seamless experience for the customer. The POS handles duties including customer transactions, Work Orders (WO), sales, receipt creation, inventory resupply, and financial reports.

This section will cover the many functions of BeeLink, explaining how and why each one is used.

BeeLink Websites

BeeLink utilizes multiple websites for different purposes.

Production Website (<https://beelinebikes.com>)

The production website is strictly used for actual production activities (real customers and appointments, etc.).

Training Website(s)

Training websites are available to mechanics as a tool for training and testing. When learning how to use the website, check with the Beeline University as to which training server is available for your use.

All training websites are password protected. Beeline University provides credentials to gain access to the training server.

BeelineBikes.com for Customers

As a Mechanic you should be very familiar with a customer's experience using Beeline Bikes.com. To become familiar:

- Ensure that you have reviewed all the content on BeelineBikes.com
- On the Training Website, login as if you are a customer (Using a secondary email such as <firstname>+training@beelinebikes.com) and perform the following tasks to get the customers experience:
 - Schedule, Edit, Cancel an appointment
 - Add & edit an address
 - Refer a friend
 - Review all confirmation emails that you receive
 - Review the Online Shop and use the Learn More button

BeeLink Dashboard

The dashboard allows the mechanic to manage their schedule, service appointments, Customer Relationship Manager (CRM), Bicycle Relationship Manager (BRM), and manages corporate account appointments. After logging in to BeelineBikes.com, the mechanic accesses the BeeLink dashboard on the Beeline Bikes Production website. On the mechanic dashboard, the mechanic has the ability to:

- Manage customers
- View appointment calendar
- View Corporate accounts and appointments
- Edit Corporate Appointments
- View Syllabus

Manage Customer Accounts

Here we will go through signing up a new customer without making an appointment. All customers must sign up for an account before scheduling an appointment. Creating a customer in the system can be done in one of three ways:

1. Customer signs themselves up
2. The mechanic creates the customer using “Proxy customer creation”
3. The mechanic creates the customer using “Sign-up Lite”

1. Customers sign themselves up

The preferred method is having the customers sign themselves up on beelinebikes.com. This is done easiest on the front page of beelinebikes.com. Make certain the mechanic is NOT signed-in and then:

1. On the desktop click “Sign In” in upper right corner
2. Click “Sign Up” link



3. Offer the customer the computer to fill out their information
 - Name
 - Email
 - Address
 - Phone number
 - Customer sets password
 - Customer clicks terms
4. Be certain to have the customer click the terms of service and click the “submit” button
5. At this point you may take the computer back, the customer is in the system and in the POS
6. Sign-out the customer (if sign up is done on mechanic’s computer)

2. Mechanic Create a Customer (Proxy Creation)

The mechanic may also create an account for a customer who is not present with a Proxy Creation (for example a customer that calls the Mechanic). This process requires the customer to check their email for the Appointment Creation Email, click

the link to confirm their account, and then set a password. If the customer does not confirm their account, they have not yet agreed to the terms of service and they must sign a paper waiver before their bike is serviced.

1. Mechanic is signed-in on beelinebikes.com
2. Start at the “Dashboard”
3. Click “New User”
4. Fill out customer information
5. Before saving, notice the two check boxes that:
 - Send you to Proxy Creating An Appointment
 - Sends and ‘Account Created’ email
 - Both are checked by default
6. Customer is now in BeeLink, both beelinebikes.com and the POS
7. “Account Created On Your Behalf” email is sent to the customer
8. Instruct customer to check their email and finalize their account before any work is done by mechanic

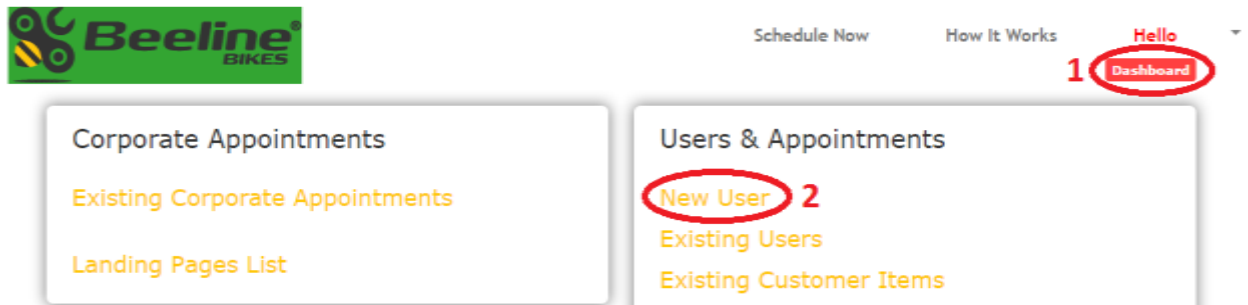
3. Sign-up Lite

Sign-up Lite is ONLY used for product sales when no service will be performed. The mechanic may create a customer without the customer providing an address, a password, and without the customer clicking the terms of service. Again, this option is only for product sales.

Do Not Use this option if you will be performing service or are selling a bicycle.

For product sales only (no service) use the “customer sign up lite”

1. Go to the “Dashboard”
2. Click on “New User”



3. Check the box marked “Product Sale Only (No Service) Sign-Up Lite”
4. Enter all of the customer’s information or hand the to them so they can enter it themselves.
5. Click “Save”

New User

3 **Product Sale Only (No Service) - Sign-Up Lite**

4 {

First name

Last name

Email

Mobile/Phone number

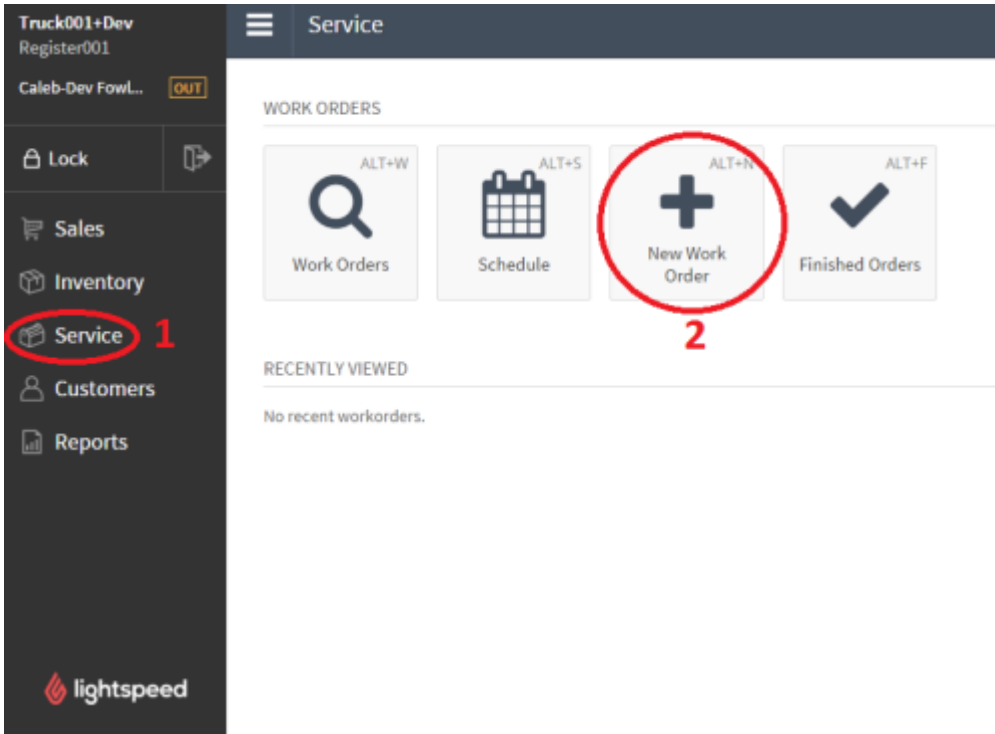
Send 'Welcome to Beeline Bikes' Email

5

When the Lightspeed API is up and running, porting of the customer’s information into Lightspeed is done automatically after it is entered into Beelinebikes.com.

If Lightspeed’s API is not working, in Lightspeed for a mechanic is to use a work order to create a new customer account.

1. Click the Service menu
2. Create a new work order



3. Enter the customer's details from Lightspeed: Important details are First and Last name, Phone Number, and Email Address.

Find or Create New Customer

To get your work order started enter customer details to create a new customer record or locate an existing customer record.

Name

Address

Home Phone
Work Phone
Mobile

Email

Birthdate

Type

Manage Appointments

Once a customer account has been created, an appointment can be scheduled. All service visits and sales interactions are all based on the customer's appointment created in BeeLink.

Most customer appointments are created directly by the customer through BeelineBikes.com without assistance from Beeline Bikes or the mechanic. Occasionally, a Mechanic will need to set up an appointment for a customer (a customer walks up to the truck or the customer calls the Mechanic directly by phone). The Mechanic may schedule an appointment on behalf of the customer using a proxy creation.

Consumer (individual) Visits

Customer created appointment (new customer)

- This may be done on the desktop or mobile version of beelinebikes.com
- The customer starts on the homepage of desktop
 1. Customer selects "My Home" button
 2. Customer enters:
 - Email address (the unique identifier for a customer)
 - Zip code
 3. Next step is selecting number of bikes and appointment start time
 - See Pricing And Service Standards for multi bike pricing discounts
 - See Scheduling Algorithm Explained for more detail
 - Select day and start time for appointment
 4. Customer then enters their personal information
 - Name
 - Location of address (home, work, other)
 - Address
 - City, State
 - Zip (already filled out)
 - Phone number (ten digit)
 - Password (minimum six digits)
 - Agree to Terms of Service
 5. Customer then Clicks "Sign Up"
 - An account Created email is sent to the customer at this point

6. Next is the Review Page which plays back the customer's appointment details

On this page the customer may enter:

any notes they have about their bicycle or visit

a promo code if they have one

7. Click "Schedule Appointment" button

Brings up Confirmation page

Confirmation Email is sent to the customer at this point

Mechanic Notification is sent (if applicable).

Customer created appointment (existing customer)

- A customer may create an appointment on the desktop or mobile version of beelinebikes.com
- They may start from the Home Page, the Customer Account Page, Home Service Page, or by using the Schedule Now button on the header of any page

From the Home Page and when the customer is signed in:

1. The customer clicks "My Home" or "Schedule Now" in the top bar.
2. Customer chooses either:
 - Use an existing address
 - Add a new address for service
3. Next step is selecting number of bikes and appointment start time
 - See Scheduling Algorithm Explained for more detail
 - Select Day and start time for appointment
4. Next is the Review Page which plays back the customer's appointment details
 - On this page the customer may enter any notes they have about their bicycle or visit
 - On this page the customer may enter a promo code
5. Click "Schedule Appointment"
 - Brings up Confirmation page
 - Confirmation Email is sent to the customer at this point
 - Mechanic Notification is sent if applicable

Proxy Created Appointment (new customer)

- See proxy section of Customer Creation
- After saving the customer's information, follow the proxy appointment creation work flow for an existing customer

Proxy Created Appointment (existing customer)

- Available on the desktop
 1. Go to the Dashboard
 2. Click “Existing User”
 3. Find customer using search bar

Remember the customer’s email is the unique id method for any customer

4. Click “appointments” button on left column
5. Click “Schedule A New Appointment”
6. Select customer’s address or enter a new address
 - See Beeline Bikes Facility if applicable
7. Select number of bikes, date and start time for appointment
 - Shown appointment start times are availabilities across all Mobile Bike Shops for the selected zip code
 - To book an immediate appointment on the mechanic’s Mobile Bike Shop click the check box “Mechanic Override” located above the number-of-bike selector
 - This only allows a mechanic to book day of appointments on their assigned Mobile Bike Shop.
 - Appointment windows that are not naturally available are designated by a red outlined start time
 - Mechanic override enables the mechanic to book on top of the existing appointments. Appointment may start earlier in the day
8. Select number of bikes and appointment start time
 - If selecting a red start time, a confirmation alert box will pop up
9. Next is the Review Page, which plays back the customer’s appointment details. On this page the mechanic may:
 - Enter any notes they have about the bicycle or visit
 - Enter a promo code on the customer’s behalf
 - Enter Beeline Notes
 - Choose to send or not send the “Appointment Confirmation” email – default is to send
 - Choose to send or not send the “Appointment Reminder” email – default is to send (only sends if appointment is made far enough in the future)
10. Click “Schedule appointment”
 - Brings up Confirmation page
 - Confirmation Email is sent to the customer at this point
 - Mechanic Notification is sent (if applicable)

Appointments for Corporate or Group Visits

Corporate or Group visits have a specific appointment type that a customer ‘joins’ by signing up for an available slot in the larger appointment. A corporate visit is visible to the consumer through a company landing page on the mobile site or through the My Work page on desktop. To locate a specific landing page, from the desktop home page, click the “My Work” button

- Select from the list of upcoming company visits on the right hand side
- Or search for a company by name on the left hand side

Certain group visits are hidden from view to the general public. In this case you may find the signup link for the specific appointment by:

1. On the desktop via the Dashboard select “Existing Corporate Appointments”
2. Scroll down to the appointment you are looking for
3. Select “Details” for the specific appointment
4. Scroll down to find the “Signup Link” for the individual appointment

Customer created Corporate or Group appointment (new customer)

- May be done on the desktop or mobile version of beelinebikes.com
- Customer has link to the specific landing page in their email, enters the landing page url, or clicks the “Work” button on desktop home page
- Customer selects Campus
- Customer selects appointment date
- Notice the address is already determined
- Customer enters
 - Name
 - Email
 - Phone number (ten digit)
 - Password (minimum six digits)
 - Number of bikes to service (1 to 3) {second page on mobile}
 - Check-in time {second page on mobile}
 - Any notes about the bike or service needs {second page on mobile}
 - Agree to Terms of Service {second page on mobile}
- Click Submit/Schedule
 - Account Created email is sent to the customer at this point
 - Confirmation Email is sent to the customer at this point

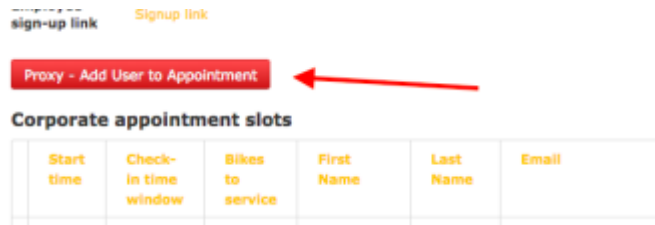
- o No Mechanic Notifications are sent for individual corporate appointments

Customer created Corporate or Group appointment (existing customer)

Same workflow as a new customer except customer's info (name, phone, email, etc.) are already filled out

Proxy Mechanic Created Corporate or Group appointment (existing customer ONLY)

- Requires customer to be an existing user in BeeLink
- Available only on the desktop
 1. Go to the Calendar
 2. Click on the specific corporate appointment
This takes you to the specific appointment page
 3. Scroll down to the bottom of the appointment details



4. Click "Proxy- Add User to Appointment"
5. Find customer with search function
Remember that the email address is the definitive identifier of a customer
Five most recently created customers are the defaulted view
6. Selected customer's name and email is shown above number of bike selector
7. Complete:
 - Number of bikes to service
 - Check-in window
 - Enter any notes about customer's bicycle(s) or visit
8. Click Submit
Confirmation Email is sent to the customer at this point

Editing a Corporate/Group Appointment

The mechanic may edit a corporate appointment to optimize their day if the corporate or group visit in the event more bikes or time need to be added to the appointment or in the event that the event is lacking sign-ups and needs to be shortened. Functions the mechanic may change are:

- The end time of the corporate appointment
- Maximum number of available appointment slots
- “Pause” Appointment

How to Edit a Corporate/Group Appointment

- Using the desktop, the mechanic goes to the Employee Dashboard
- Click “Existing Corporate Appointments”
- Find the corporate/group appointment you wish to edit
- Click “edit”
 - If the appointment has started you will receive a dialogue box confirming you wish to make edits
- Change the:
 - **End time** - The mechanic can shorten or lengthen the appointment to increase their availability later in that day. Making a corporate/group event finish earlier will increase the availability of the mechanic’s Mobile Bike Shop
 - **Maximum number of appointment slots** Increase the maximum number of slots to allow walk-up customers to signup for the corporate/group appointment. Decrease the maximum number of slots if one particular bike will take the effective time of two or more bikes.
 - Click “Save” to make changes effective

Pause the appointment

This prevents all customers from reserving otherwise open slots in the corporate or group appointment. An appointment can also be “unpaused” to resume taking appointment reservations.

Scheduling Algorithm Explained (Individual/Consumer Appointments Only)

The scheduling algorithm determines the base time an appointment with a certain number of bikes will require. While these parameters are changeable (see *Editing an Appointment* – Section 7), it is helpful to understand how a typical appointment is treated.

Understanding how much time an appointment requires will also help the mechanic understand what times are available for a customer to schedule an appointment.

The scheduling algorithm is based on three criteria:

1. The number of bicycles selected for the service appointment
The higher the number of bikes, the more time is allotted for the appointment
2. Rounding up to the next 30 minute block
Based on the number of bicycles selected, the total time is rounded up to the next 30 minute mark as needed
3. Buffer time
Additional time is added to the end of an appointment to facilitate travel to the next appointment

Internal “Beeline” Notes

Beeline Notes are internally viewable notes associated with a specific appointment, customer, or corporate entity. These notes are viewable to the mechanic on both the desktop and mobile syllabus, but are not shared with the customer.

To add a Beeline Note

- Available on the desktop
- From the Employee Dashboard
- Go to the Calendar
 - Locate the specific appointment
- Click on the appointment to open the specific Appointment Page
- Click “Add” button next to Beeline Notes
- Add your Beeline Note
 - Beeline Notes are automatically attributed to the author and date and time stamped
- Click “Save”

To edit a Beeline Note:

- To avoid revising the history of notes, a Beeline Note may only be edited when:
 - The original note author is the current user
 - No other notes have been added afterwards
- Find the Appointment of interest from the Appointment Calendar.
- Assuming the criteria is met that the current user is the most recent Beeline Note’s author, an Edit button will appear next to the note.
- Click the Edit button; make changes as desired; and click “save” to complete the edit.

***Communications Policy:** Even though BeeLink does not share Beeline Notes with customers, it’s a best practice to never write anything you would regret having the customer read. Assume customers will see anything you write regarding their appointment. (see Customer Interaction - Section 5)*

Minor Appointment Adjustments Using “Tweak”

Tweak is a feature available to the mechanic so that they can make small adjustments to a customer’s appointment without having to completely edit the entire appointment information. You cannot alter the appointment address or the date on which an appointment occurs via Tweak, but you can tweak the other appointment attributes. Adjustments may be made to

- Ensure the appointment reflects reality, i.e. it took more or less time than scheduled.
- Open your schedule up to allow more signups (for example by changing a 2 hour appointment to a 1 hour appointment)
- Close your schedule because customer has more work than originally planned

TIP: Always double-check your changes by viewing the Calendar after using the “tweak” function.

1. On a desktop start at the Appointment Calendar found on Dashboard
2. Find and select the appointment you would like to Tweak
This will open the Appointment Details in a new window
3. Find and click “Tweak” button
4. Once in Tweak you are able to independently adjust
Number of bikes. (Changing number of bikes does change the end time per the scheduling algorithm; end time can then be changed)
Start time
End Time
Add notes to the appointment to explain the changes
Add/remove/change a Promo Code
Optional check box to prompt an “appointment update” email sent to the customer
5. Double check your Tweak by looking at the appointment on the Calendar

Using Fillers

Mechanics use filler appointments to fine-tune their schedule and availability. For example, if a mechanic needs to block a particular morning from a customer booking an appointment, the mechanic may create a Filler to do so. Customers are not able to book appointments that would overlap with a Filler. (See *Scheduling* – Section 5)

Creating a Filler

- On Appointment Calendar, the mechanic clicks “add filler”
- The Add Filler window pops up where the mechanic selects
 - The Date for the Filler
 - Option to select “All Day.” If unselected, the mechanic chooses the start and end time for the filler
 - A dialogue box where the mechanic may put the reason for the filler
 - Click “OK” to save changes

Reading a Filler

The mechanic may see the Fillers on their schedule by going to the BeeLink Dashboard and clicking on Appointment Calendar. Fillers are viewed as appointments but in a different color than the consumer or corporate appointments.

Updating a Filler

- On Appointment Calendar, the mechanic selects the particular Filler they wish to edit
- The Edit Filler window pops up where the mechanic may change
 - The Date for the Filler
 - Option to select “All Day.” When unselected, the mechanic chooses the start and end time for the filler
 - A dialogue box where the mechanic may put the reason for the filler
 - Click “OK” to save changes

Deleting a Filler

- On Appointment Calendar, the mechanic selects the particular filler they wish to delete
- The Edit Filler window pops up where the mechanic may
 - Click “Delete” to delete the filler

Using the Mobile Syllabus

The Mobile Syllabus is the main tool for a Mechanic to manage the daily schedule. While the syllabus is available to the mechanic in a desktop format, it has been designed as a mobile-first experience to provide the mechanic the ultimate convenience while in the field. This part of the manual assumes the mobile syllabus unless otherwise stated.

1. Log into beelinebikes.com
2. Go to the Dashboard
3. Select Syllabus Report

The syllabus defaults to today's date and you as the Mechanic. To select a different day, adjust using the date selector and touch "Generate"

Find your first appointment

- Use the address link to view location in Google Maps
- Use customer phone number to contact customer
- View Appt. Notes and Beeline Notes for greater understanding of appointment

Appointment-specific information on the Syllabus

- Start Time
- End Time
- Number of bikes scheduled for the visit
- Waiver signed: Yes or No
 - If No, then you must have the customer either log in to beelinebikes.com and select the terms of service or sign a paper waiver. This must be done before any work or assessment is done to the bike
- Discounts customer receives
 - Promo codes
- Bike Info link
 - Use this to enter information about a customer's bike(s)
 - Sync with POS

Use this in the event that you do not see the bicycle you have entered in the POS (see *Work Order Structure – Section 7*)

Upload a picture of the bike

See Taking and Uploading a Picture

Select Next Recommended Service

A critical step that encourages repeat business

Selectable for each bicycle

Adjust appointment (if necessary)

- (see Minor Appointment Adjustments Using “Tweak” – Section 7)

Mark Appointment Done

- Prompts the sending of a thank you email; (recommended that Mechanic performs this process at the end of each day)
- The mechanic marks an appointment done only after they have set a service interval and loaded the finished bike picture
- Marking appointment “done” cues up a Thank You Email to go out at 7 PM that night
 - If the mechanic marks an appointment done after 7 PM that night, the thank you email is sent when you click “done.”
- The mechanic may mark an appointment “canceled” when
 - Customer is a no show
 - Customer declines all work on the bike
 - Mechanic declines to offer service

Taking and Uploading a Picture

Documenting the mechanic's work is a critical part of the customer's experience with Beeline Bikes. This section will discuss how to take a quality photograph as well as how to load the picture into the system, assigned to the customer's specific bicycle.

Type 1) a specific component or issue

When working on a bicycle there will be a time in which you will come across a particular problem or a broken part. Taking a picture of this part before you start any work will help explain to the customer the issue that you are addressing. Taking these pictures will also help protect you from any he-said-she-said situations between you and the customer.

- Find the customer's bike on the mobile syllabus and select add photo
- Take the photo
 - Subject of photo should be clear, in focus, and well lit
- Under "work stage" select either "before" or "during" depending on when you found the issue.
- Write in the comment box to add context for the picture
- Select "add" to upload the photo

Depending on your wireless connectivity, uploading times may vary

Type 2) a profile shot of the whole bike at the completion of service

We take a side profile of the bike after all work is done. This is set as the bicycle profile image, helping us to identify the bike. This picture also provides important documentation of how the bike looked when it was delivered to the customer. For this reason, it is important to reinstall all parts (water bottles, seat bags, lights, etc.) before taking the final picture.

- Find the customer's bike on the mobile syllabus and select add photo
- Take the photo – for taking a high quality photo, see below.
- Under "work stage" select either "after"
- Select "add" to upload the photo

Depending on your wireless connectivity, uploading times may vary

Taking a photo of a bicycle

Because the photo is both an internal documentation of work you did, and the photo is a customer facing part of the Beeline experience, quality does matter. For a the finished bicycle photo use these guidelines:

- Always take a picture of the drive side of the bicycle
- Ideally take picture against a monotone background. When this is not possible, using the back of the Mobile Bike Shop works adequately
- Avoid sharp shadow lines, they can obscure the image
- Kneel down a bit to get as level a shot of the bike as possible; you want to avoid “looking down” on the bike

Example of good photo



Example of noisy background



Example of out of focus



Example of “looking down” on the bike



Mechanic Notifications

The Beeline System automatically sends notifications to the mechanic when the mechanic's schedule changes in the near future. Changes include an appointment created, appointment updated, appointment canceled, or a change to a corporate appointment.

Notifications to the mechanic fall into two categories: **Important** and **Critical**.

Mechanics and Team Managers are bcc'ed all appointment emails (new, update, delete) to which they are assigned

Important: An important notice is defined as an appointment start time within 8 standard business hours. This prompts the system to send an email notification to the mechanic. The subject line of the email includes:

- Appointment action (Assigned or Unassigned)
- Appointment Date
- Appointment Start Time
- Location (City)
- Customer Name or Corporation Name
- Mobile Bike Shop Number
- Assigned mechanic(s)

Critical: Appointment start time is within 5 standard business hours. This prompts the system to send an email and text notification to the mechanic. The subject line of the email matches the text message with identical information the Important Notification.

The system also sends Mechanic Notifications if the appointment start time is up to 1 hour in the past.

Appointment Availability by Zip Code

This feature allows you to see all available appointments with a simple zip code lookup. This feature is available to all BeeLink users and is available on desktop only

- Start at the Beeline Dashboard
- Click “Check Zip Schedule”
- Enter customer’s zip code and click “lookup”

Lookup allows up to select number of bikes and a particular day, identically to a normal scheduling workflow.

Customer Emails

BeeLink will automatically send emails to the customer in a variety of situations. These emails are designed to best communicate to the customer what is happening and will happen without the direct involvement of the mechanic for each communication. The Customer Emails consist of the following:

Account Created

The Account Created email is sent to the customer when they first create their account in BeeLink. This email plays back to the customer the customer's name, address, and telephone number.

In the case of a Proxy Account Creation, the Account created email includes a link for the customer to confirm their account and set a password. This step is when the customer will agree to the Terms of Service

Appointment created/edited/canceled

BeeLink Platform sends an email to the customer when the customer creates, edits, or cancels an appointment. In each case the email updates the customer about the new condition of the appointment.

BeeLink also send appointment reminders for any individual or corporate appointment one business day before the appointment. If the customer very recently scheduled the appointment, the reminder is deemed unnecessary and is not sent.

Service Reminder

Service Reminder emails are prompted by the date at which the mechanic sets a service reminder for each individual bike. The email reminds the customer that it is time for them to schedule a service for that bicycle.

Service Reminder emails are a solution for customers who wish to have their bicycles serviced regularly but forget to schedule appointments. The Service Reminder emails also help to ensure a steady flow of business to the mechanic.

Thank You Emails

Customer Thank You emails are prompted once the mechanic marks an appointment “done” on the desktop syllabus. The Thank You email asks the customer to rate the service (1-5 stars), requests feedback and provides another valuable touch point for the mechanic to connect with the customer. Thank you emails are delivered at 7pm on the day of the appointment if marked done that day. If the customer provides a rating (1-4) stars, the customer receives an email confirming the less than 5 star rating and asking what we could do better. No follow-up emails are sent to customers who provide 5 star ratings (mechanics receive email notifications of all ratings including 5-star ratings). If marked done the following day, the Thank You email sends immediately. The mechanic should always mark the appointment done even if the work order is still open. However when marking an appointment done for an open work order, the mechanic should select “do not send thank you email.” on the prompt that follows.

Point of Sale (POS)

The POS is how the mechanic manages inventory, tracks service and parts to each bicycle, and takes payment from the customer.

Opening/Closing the Register

Each day the mechanic will need to open and close the cash register.

- Once logged into the POS, click “Choose Register”
- The mechanic then clicks the register assigned to their Mobile Bike Shop
- Enter the Opening Counts for the cash box by entering the quantity of each denomination
- Click “Submit Count” to open the register
- Closing the register is a very similar process of counting the cash with the additional step of reviewing the credit card, check payments, and gift card payments.
- Click “Sales”
- Click “Close Register” button
- Enter the Closing Counts for the cash box by entering the quantity of each denomination
- Click “Submit Counts”
- Click “Save Counts” to verify the closing counts and close the register fully

Work Order Structure

Absolute musts when dealing with POS Work Orders (WOs)

- There is a strict ratio of 1:1 for Bikes to WO. Never use a single WO for multiple bicycles.
- If it is not written down, it didn't happen. Make notes about everything you see, everything you do, and everything you tell the customer.
- Double check that you have the correct customer. A customer's email is the authoritative indicator for any customer

Work Flow for creating/using/finishing WO in the POS

- Create a WO
 - Select “Service” on the left menu
 - Select “New Work Order”
 - Search and find customer

Remember that all customers are created in Beelinebikes.com

Remember that **ALL** customer accounts may exist with the same name and even phone number. Search by email to be absolutely certain

- Set time and date
 - Select “Date In” as the date and start time of the appointment
 - Select “Due” as the date and start time of the appointment
- Select customer's item [bicycle]
 - First check if the bike is already in the customer's item list. Note that if the Syllabus indicates “Cust Appt #” other than 1 the bike should already be in POS.
 - If not already there, create a new item by filling out
 - Description [brand] [model]
 - Color
 - Size
 - Serial number
- Enter labor SKUs into WO for the repair
- Scan barcodes for parts and accessories associated with this bicycle
 - Scan each item individually to limit mistakes
- Taking Notes in WO
 - See Work Order Notes
- Finish the Work Order
 - Mark each line of service as “finished”
 - Ensure that each line item is assigned to the correct mechanic by selecting “Assign employee to all lines” just before finishing WO
 - Change WO status to “finished” – found in upper left hand corner
- Checkout
 - Select “checkout”
 - Then select “Complete” this will take you to the Sales/Payment area of the POS.

Checking out a WO is very similar to the Sales process. One step that differs is the need to “complete” each WO. Select “checkout” for every WO from the Work Orders tab to put them into the Sales tab.

Take Payment

Work Order Notes

Notes should be done in two steps. The first is during the assessment process. List the things/items that are an issue. These are issues that are specific to each bike as it

relates to the Full Tune-up. At least three items should be listed although it may be more. It is also appropriate to state the solution at this time. Follow each issue with a hyphen. If there are no specific issues, write what is specifically good (tires aired up, front and rear wheel true, etc.)

Front tire flat, needs new tube –
Front tire has hole in drive side sidewall, needs replacement -
Chain worn beyond .75 –
Cassette may need replacement -
Shift cables and housing sticky, recommend replacement -

Use this first set of notes as a sales tool during your conversations with the customer.

Go through the list with the customer, verbally while visually identifying each specific problem you diagnosed.

Following the hyphen, type the resolution to each problem. If the customer declines

Front tire flat, needs new tube – replaced front tube and velox, old rim strip damaged
Front tire has hole in drive-side sidewall, needs replacement – replaced front tire
Chain worn beyond .75 – replaced
Cassette may need replacement – No skipping on test ride
Shift cables and housing sticky, recommend replacement - customer declines; shifting less than optimal. This is explained to the customer

the part/service, write that here.

It is also appropriate to use the notes section to outline anything that is unusual about a particular WO. Examples of this include:

- “Bicycle work is too costly for customer; customer declines all work.”
- “Customer prefers a text message for contact”
- “After wiping down a crack in bicycle frame found on drive-side chain stay; needs new frame, no work done to bike.”
- “Bicycle needs special order shifter; order shifter, keep bike with Mobile Bike Shop; call customer when work is done to schedule a drop-off appointment.”

Transacting a Sale (without Service)

For scenarios where the mechanic is not working on a bicycle, the POS has the option to conduct a sale without using a Work Order.

- On the POS, the mechanic clicks “Sale”

- Click the “New Sale” Button
- Search for customer and attach the customer to the sale (If customer does not already have them use sign up lite. See Section 7 - Manage Customer Accounts)
- Enter items
- This process should also be used at the end of each day to record cash tips received. Simply transact a sale for the total cash tips received to the designated Tips Account prior to closing out the register for the day.

Taking Payment

- After clicking the “Payment” button the mechanic chooses from the following payment options
 - Credit Card payment
 - Swipe the customer’s card to take payment and completes sale
 - Gift Card
 - Scan the Beeline Bikes gift card
 - The balance of the card is shown
 - Mechanic clicks “charge” for the amount they wish to debit from the gift card and completes sale.
 - Cash
 - Check (for Checks recommend in state checks only with a validate state issued ID that matches the name on the check)
 - To Be Invoiced – see Invoicing for Work Performed (below)

Invoicing for Work Performed

Occasionally, customers will require an invoice in order to remit payment for services performed. This usually occurs when dealing with an organizational entity, such as a property manager or corporation. The invoice process involves one of two workflows, depending on the nature of the work performed:

1. Parts and service captured in POS

Use case: corporate customer is the direct owner of all bikes serviced (i.e fleet or bike-sharing program)

1. Create WO(s) in POS as normal for all bikes
2. At the conclusion of service, select “To Be Invoiced” as the payment method
3. Print POS receipt as PDF

4. Create invoice in accounting system reflecting total parts, accessories, and any sales tax.
5. Save invoice as PDF
6. Send accounting system invoice and POS detailed receipt to corporate customer

2. Subsidized Service (not in POS)

Use case: Company subsidizes service for employees' individual bikes

1. Create WO(s) in POS
2. Do not charge employees for subsidized portion of service. Add service SKUs on to WO and discount to the subsidized price (usually \$0.00, but sometimes a company will partially subsidize the service).
3. At the conclusion of service, create invoice in accounting system reflecting total subsidized amount per existing agreement with corporate customer

Print invoice as PDF and email to corporate customer

Section 8 – Policies

Service Delivery Policies

Waiver Completion and Collection

A customer must sign the waiver (physical copy or electronically) before any work is done to their bike.

- This includes the initial assessment of a bike
- The waiver is collected and added to the customer's profile by the franchise owner or lead mechanic

An Email address is required for every customer, and each customer is defined by their email address

- Multiple customers may share customer attributes with another customer, such as name, address, phone number, etc.
- The only unique identifier of a customer is their email address
- The email address is the customer's user name in the beeline system
 - For example, a single person may have created two customers in on the Beeline site if they used different emails

One Bike to One Work Order per appointment

- Every bike assessed or worked on by a mechanic should have its own work order
- This work order will reflect the description of the bike it is representing and is unique to that bike
- This provides more accurate repair and service history and can be used for record keeping and buying history of the customer for that unique bike

Appointment arrival and set up policy

- Every appointment requires:
 - A customer
 - A Mobile Bike Shop
 - An assigned mechanic
- Double check start time, number of bikes, and that a Mobile Bike Shop and mechanic are assigned to the appointment
- Arriving on-time means arriving 5 minutes early

- If your next appointment starts at 11:00, the optimal service expectation is you will be 100% ready to service the customer by 10:55
 - This means the Mobile Bike Shop is open, the work order is created and pulled up on the computer
- When making changes to the schedule, be certain to double check your efforts by looking at the calendar view and locating the appointment you affected

Syllabus

- Set a reminder interval
- Take a photo of every bike
- Mark every appointment done after work is completed

Customer Return Policy

The mechanic is required to allow a customer to return a product purchased through Beeline Bikes when the item is returned within 30 days from date of purchase. After 30

Installed parts and accessories:

The mechanic consults with the customer and gets their approval prior to installing any product on the bicycle. To the extent the product does not meet the customer's expectations, the customer may return the product within 30 days from the date of purchase for a replacement product or store credit.

Packaged parts and accessories:

New, unused parts and accessories can be returned within 30 days from the date of purchase for a full refund provided they are returned in the original box and/or packaging, including manufacturer tags where applicable, in a sellable condition.

New bicycles:

The mechanic offers a free consultation in advance of the customer's bicycle purchase to ensure the correct bike is purchased. To the extent that the customer cancels their order or is not satisfied with the new bike, the mechanic will accept the return of a new, unused bicycle within 30 days from the date of purchase, and will issue the customer store credit less a 15% restocking charge.

Section 9 – Reporting and Financial Activities

Overview

- BeeLink's Point of Sale (currently Lightspeed POS) system tracks daily, weekly and monthly sales totals with the exception of invoices generated from Quickbooks for corporate accounts.
- QuickBooks is your accounting system and tracks all expenses based on input from your credit card and checking account (you must have a credit card account and bank account that integrates with QuickBooks online)

Daily Activities

- Review POS reports for reasonableness
 - Review daily sales summary by customer
 - Review daily sales summary by item/product
 - Note any exceptions and resolve as necessary
- Issue invoices from QuickBooks for corporate or event billings as appropriate. (see *Invoicing for Work Performed* – Section 7)
 - For subsidized services or event fees not sold through POS, issue an invoice for services from QuickBooks.
 - For any sales closed out in POS using To Be Invoiced Payment, issue an invoice in QuickBooks to the total amount of the sale separating taxable, not taxable, and sales tax. Attach a copy of the POS email receipt (to the extent that the customer requires a detailed description of the services performed)
- Record cash and check sales in quickbooks, applying to service revenue, product revenue and sales tax payable, where applicable

Weekly Activities

- Royalty Review & Reporting
 - Compare weekly payments reports in POS to the weekly royalty statements provided by Beeline Bikes accounting
- Bookkeeping
 - Review all outstanding invoices & bills from non-Beeline suppliers and ensure timely payment
 - In QuickBooks perform the following:
 - Classification for all bank activity – payments made via check or credit card, and deposits received (cash, check and ACH)

Record weekly Beeline ACH settlement to QuickBooks from weekly royalty & settlement statement (see *Appendix B*)

- Log into your online bank account and review activity for reasonableness
- Review outstanding accounts receivable to determine if follow up is needed with billed customers.

Monthly Bookkeeping and Reporting Activities

- For bookkeeping purposes the month will end on the Sunday preceding the calendar month end (the “Month End Cutoff”)
 - Ensure that all activity for the month has been categorized and recorded in QuickBooks (“QBO”) (per daily & weekly activities above).
 - Ensure that all inventory physically received by the Month End Cutoff date has been received into LSR prior to the Month End Cutoff date
 - Generate inventory listing as of the Month End Cutoff date by running the LSR Inventory Asset History Report as of the Month End Cutoff Date
 - Count petty cash drawer and enter any activity in QBO.
 - Ensure that any debt re-payment (vehicle loan, etc.) has been properly split between principal and interest.
- Once all transactions are entered perform the following:
 - Reconcile cash in QBO to your bank account
 - Review the Accounts Receivable aging report in QBO for accuracy.

Ensure inventory per QBO equals inventory per LSR. Investigate and resolve any discrepancies

- Review Profit & Loss and Balance Sheet reports in QBO to ensure that items are properly categorized. A comparison with prior month’s activity is helpful.
- Submit monthly P&L and Balance Sheet from QBO to Beeline Franchising by email at FranchiseReporting@BeelineBikes.com within 14 calendar days of each Month-End Cutoff date.

Bookkeeping services

- Beeline offers assistance in setting up your Quickbooks system, providing weekly settlement activity in a form that supports the entry of accounting information into quickbooks and answering questions with respect to financial information provided by Beeline Bikes
- See *Appendix C* for a description of bookkeeping services.

Appendix Items

- Sample Chart of Accounts, P&L and Balance Sheet (3 pages)
- Sample Weekly Royalty & Settlement Report (1 Page)
- Description of Bookkeeping Services (1 Page)

Section 10 – Compliance

Brand Standards

- In order to deliver the consistent, reliable, and high level of service standards of Beeline Bikes, a franchise owner or lead mechanic must operate in the same manner and exercise the same principles throughout the franchise model
- The goal is for each customer to experience the same exact service whether they are in California or New York.
- Beeline will become known for quality service and the customer will recognize the brand and identify to the high service level they experienced.
 - A higher service standard leads to high referral rates
 - This level of service and dependability will also lead to higher repeat customer appointments

Services

- The services involved in the Beeline Bikes Operating procedures will be taught and can be referenced in sections throughout the operations manual
 - These areas include customer service, appointment procedure, communication and follow up
- If a franchise owner is not following the brand standards for services, a default and re-training requirement may be implemented
- Minimum service levels are not acceptable when it comes to the mechanical safety standards that must be followed
 - No corners will be cut if safety is a concern
 - Every bike serviced by a Beeline Bikes franchise owner or lead mechanic must be 100% mechanically safe to ride in the intended use

Products

- Beeline Bikes chooses parts and accessories that meet the high quality, safety and cost standards that have become an integral part of the Beeline Bikes business model and the customer experience
- Beeline Bikes will combine the purchasing power of all company and franchise owned units to purchase most parts and accessories at a lower price than a single unit bike shop
 - This allows for the franchise owner to pass on this savings to the customer and keep the mobile bike shop as competitively priced as any traditional bike shop
 - While Beeline Bikes always aim to meet a customer's needs immediately and efficiently, a mobile shop cannot stock every single item that may be needed
 - Beeline Distribution can source any item or product needed or requested with a special order (see *Special Orders* – Section 4)
 - A special order can be overnighted to the mobile shop if the item is in stock or can be sourced immediately
- The Mechanic must not secure a requested item from another non-approved vendor without prior approval of Beeline Bikes.
- A default will be issued and possible termination could arise if a franchise owner or lead mechanic is found to be using, buying and selling unauthorized product through the Beeline Bikes mobile bike shop

Professionalism standards

- Beeline Bikes has established a higher level of customer service standards that reflect a more refined professionalism than the traditional bike shop
 - The Mechanic has a stake in the business and therefore is responsible and accountable for the results of any poor level of service
- Customers are asking and allowing the Beeline Bikes Mechanic to come to their home or place of work to complete the service that they cannot perform themselves
 - With any home or work service provider, a customer is expecting to be treated with courtesy, politeness, and honesty
 - The customer wants to experience a feeling of satisfaction and comfort from the purchase that the service has been completed professionally and they paid a fair price

Operations Review

- Beeline Bikes Franchising company will require franchise owners to allow a representative from Beeline Bikes Franchising to visit and ride along in the mobile bike shop unit from time to time
- The number of scheduled operations visits will be set at a regular interval
 - Example could be once per quarter
- The normal operational review visit will include two full day ride along in the Beeline Bikes Mobile Bike Shop
 - A longer visit may be necessary if a franchise owner or lead mechanic require more training or is in default and needs recertification to cure the default
- Mobile Bike Shop visits
 - A Mobile Bike Shop visit will be performed by a Beeline Bike's Operations and/or Training team member
 - The purpose of the visit will be to perform the following checks:
 - Operational standards are being followed by the franchise owner or lead mechanic
 - Safety standards and vehicle maintenance are being adhered to and up to date with any requirements
 - Daily operational procedures from start of day, to appointment, to end of day are being followed and franchise owner or lead mechanic are performing well
 - Any retraining or coaching can and may also be administered during the two day visit
 - Transaction and work order processes being followed
 - All products being stocked and sold are approved and restocking processes being followed

Audits

- Beeline Bikes Franchising reserves the right to audit all services, transaction and processes performed by all franchise owners and lead mechanics
- Safety and royalty audits may be performed at any time
 - Safety audits can either be performed during the normal operations review visits or be scheduled with 24 hour notice if any safety related default is incurred
 - If a severe safety issue arises, Beeline Bikes can issue an immediate default and/or termination and shut down the operations of the franchise owner
 - Royalty audits will be performed on a regular basis by Beeline Bike Franchising utilizing the normal required reporting collected from the franchise owner
 - If a violation is suspected, a royalty audit can be requested by Beeline Bikes Franchising at any time and the franchise owner must provide all reporting and supporting documents requested within 48 hours of the request

Default, Cure and Termination process

- When a franchise owner does not follow or adhere to the terms of the franchise agreement, he or she may be defaulted by the franchisor Beeline Bike Franchising
- The notification of the default will include the date of the violation, date of notice, and amount of time granted to the franchise owner to cure the defined default
 - The normal default cure period could be 30 – 60 days and will be determined based on the estimated time required to cure such a default
 - An operations team member may be required to visit the franchise unit in order to verify the default has been cured
- If a default is not cured within the granted time period noted in the default notification, Beeline Bikes Franchising could:
 - Issue a second default and allow for more time to cure the default
 - Issue a termination notice
- A termination notice can be issued after a default cure period has elapsed without the approved resolution performed by the franchise owner
- A termination notice can also be issued if an immediate safety, royalties, franchise fees, or other significant action that can inhibit the franchise unit's business operations is encountered by Beeline Bikes franchising

Safety

Customer

- A customer's personal safety is the top priority of every Beeline Bikes representative, franchise owner or lead mechanic
- Any issue arising and causing a safety issue could result in termination of the franchise agreement, and personal liability for any damages incurred by a customer

Vehicle and equipment

- The vehicle (Mobile Bike Shop) used for delivering and performing the services of Beeline Bikes must always be in good working condition. This includes the following:
 - Normal routine maintenance to be performed and tracked by franchise owner or lead mechanic
 - Any cosmetic or vehicle safety issues (worn tires, headlights, scratched illegible graphics, etc.) must be fixed within one week of first detection
 - This will be covered and reviewed during the normal operations unit visits
 - License plates, emissions, business license copies, and any other motor vehicle requirements must be current and readily available if requested
- Equipment used within and around the Beeline Bikes unit must be in good, safe working condition.
 - If any equipment is determined to need repair, updating, or replacing the franchise owner or lead mechanic must complete the request within one week of detection

Insurance

Maintain minimum coverage

- Insurance is required for all franchise owned units and must be current and have the required minimum coverages
- These coverages are determined by Beeline Bike Franchising and are reflected in the Federal Disclosure Document

Dropped coverage

- Should a franchise owner be canceled by their insurance provider, Beeline Bikes Franchising must be notified immediately
- The franchise owner or lead mechanic must cease business operations immediately
- Franchise owner or lead mechanic must cure the amount owed to reinstate the minimum insurance required before they can begin to operate the Beeline Bikes unit
 - This must be done as soon as possible or within 48 hours of loss of coverage
- The franchise owner will be issued a default by Beeline Bikes Franchising

Legal

Waiver policy

- A liability waiver must be completed and retained on file before any service is provided to any Beeline Bike's customer (see *Manage Customer Accounts* -Section 7)

Driving violations

- Minor traffic offenses (parking tickets, slight speeding, minor vehicle ticket, etc.) will be tracked and if become a recurring issue can be cause for default and/or termination by Beeline Bikes Franchising
- Major traffic violations (DUI, Accidents resulting is bodily damage, etc.) will be issued a default and termination unless determined otherwise by Beeline Bikes Franchising

Other offenses

- Any criminal offenses will be cause for default and/or termination by Beeline Bikes Franchising
- Any litigation against a franchise owner arising from the operations of a franchised owned unit may be cause for default and/or termination by Beeline Bikes Franchising

Section 11 – Appendix

Appendix A - Sample Chart of Accounts, P&L and Balance Sheet

Appendix A - Page 1
Beeline Franchisee
Sample Monthly Profit & Loss Statement

Income	
Revenue	
Service Revenue	6,200.00
Sales (Product) Revenue	6,200.00
Total Revenue	<u>12,400.00</u>
Cost of Goods Sold	
Parts & Inventory	3,410.00
Total Cost of Goods Sold	<u>3,410.00</u>
Gross Profit	<u>8,990.00</u>
Operating Costs	
Freight & Delivery	68.20
Shop Supplies & Consumables	248.00
Gas	250.00
Truck Repair & Maintenance	125.00
Truck Insurance	150.00
Company Liability Insurance	41.67
Merchant Account Fees	285.20
Marketing / Promotions Expense	248.00
Brand Advertising Fee	248.00
Franchise royalty	992.00
BeeLink fee	175.00
Bookkeeping Services	99.00
Interest Expense	187.50
Mobile Communication Expense	200.00
Taxes, Licenses & Fees (DMV, City License, Corp)	50.00
Total Expenses	<u>3,367.57</u>
Net Operating Income	<u>5,622.43</u>
Net Income	<u>5,622.43</u>

Page 2
Beeline Franchisee
Sample Balance Sheet

Assets

Cash	
Bank Account	13,622.43
Petty Cash	100.00
Total Cash	<u>13,722.43</u>
Accounts Receivable	500.00
Inventory	<u>10,000.00</u>
Fixed Assets	
Truck	44,000.00
Equipment & Tools	4,000.00
Accumulated Depreciation	
Net Fixed Assets	<u>48,000.00</u>
Franchise Fee Asset	<u>10,000.00</u>
Total Assets	<u>82,222.43</u>

Liabilities

Accounts Payable	
Trade AP	300.00
Sales Tax Payable	300.00
Credit Card	1,500.00
Total Accounts Payable	<u>2,100.00</u>
Loans	
Truck	40,000.00
Bank Loan	-
Total Loans	<u>40,000.00</u>
Total Liabilities	<u>42,100.00</u>

Equity

Investment From Owners	35,000.00
Owners Draw	-500.00
Retained Earnings (Previous Years)	-
Current Year Net Income	5,622.43

Total Equity 40,122.43

Total Liabilities & Equity 82,222.43

Appendix A - Page 3

Beeline Franchisee

Sample Chart of Accounts

Account	Type	Detail type
Checking	Bank	Checking
Cash/Check Collected - Pending Deposits	Bank	Cash on hand
Petty Cash	Bank	Checking
Accounts Receivable	Accounts receivable (A/R)	Accounts Receivable (A/R)
Inventory	Other Current Assets	Other Current Assets
Inventory Asset	Other Current Assets	Inventory
Uncategorized Asset	Other Current Assets	Other Current Assets
Undeposited Funds	Other Current Assets	Undeposited Funds
Weekly Settlement Clearing	Other Current Assets	Other Current Assets
AccumDepr - Equipment	Fixed Assets	Other fixed assets
AccumDepr - Trucks	Fixed Assets	Other fixed assets
Equipment	Fixed Assets	Other fixed assets
Truck	Fixed Assets	Other fixed assets
Franchise Fee	Other Assets	Other Long-term Assets
Franchise Fee Accumulated Amort	Other Assets	Other Long-term Assets
Accounts Payable	Accounts payable (A/P)	Accounts Payable (A/P)
Credit Card	Credit Card	Credit Card
Customer Deposits	Other Current Liabilities	Other Current Liabilities
Sales Tax Liability	Other Current Liabilities	State/Local Income Tax Payable
Sales Tax Payable	Other Current Liabilities	Other Current Liabilities
Shareholder Notes Payable	Long Term Liabilities	Shareholder Notes Payable
Loan for Truck	Long Term Liabilities	Notes Payable
Opening Balance Equity	Equity	Opening Balance Equity
Owners Draw	Equity	Owner's Equity
Retained Earnings	Equity	Retained Earnings
Interest Income	Income	Discounts/Refunds Given
Sales of Product Income	Income	Sales of Product Income
Service Revenue	Income	Sales of Product Income
Uncategorized Income	Income	Sales of Product Income
Cost of Goods Sold	Cost of Goods Sold	Supplies & Materials - COGS
Parts & Inventory Cost Of Goods	Cost of Goods Sold	Supplies & Materials - COGS
Accounting Services	Expenses	Other Miscellaneous Service Cost
BeeLink Fee	Expenses	Other Miscellaneous Service Cost
Brand Advertising Fee	Expenses	Other Miscellaneous Service Cost
Charitable Contributions	Expenses	Charitable Contributions
Cost of Labor	Expenses	Cost of Labor
Cost of Labor:Commissions	Expenses	Cost of Labor
Cost of Labor:Salaries	Expenses	Cost of Labor
Franchise Royalty	Expenses	Other Miscellaneous Service Cost

Freight & Delivery	Expenses	Other Miscellaneous Service Cost
Gas	Expenses	Other Miscellaneous Service Cost
Insurance - Liability	Expenses	Other Miscellaneous Service Cost
Insurance - Truck	Expenses	Other Miscellaneous Service Cost
Interest Expense	Expenses	Other Miscellaneous Service Cost
Legal & Professional Fees	Expenses	Legal & Professional Fees
Marketing/Promotional Expense	Expenses	Other Miscellaneous Service Cost
Meals and Entertainment	Expenses	Other Miscellaneous Service Cost
Merchant Account Fees	Expenses	Other Miscellaneous Service Cost
Mobile Communication Expense	Expenses	Other Miscellaneous Service Cost
Office Supplies	Expenses	Office/General Administrative Expenses
Parking	Expenses	Advertising/Promotional
Parts & Tools	Expenses	Supplies & Materials
Payroll Processing Fee	Expenses	Payroll Expenses
Payroll taxes	Expenses	Payroll Expenses
Shop Supply & Consumables	Expenses	Other Miscellaneous Service Cost
Taxes, Licenses, & Fees	Expenses	Other Miscellaneous Service Cost
Telephone/Internet	Expenses	Utilities
Training	Expenses	Advertising/Promotional
Travel	Expenses	Travel
Truck Repair & Maintenance	Expenses	Other Miscellaneous Service Cost
Uncategorized Expense	Expenses	Other Miscellaneous Service Cost
Uniforms	Expenses	Office/General Administrative Expenses
Depreciation	Other Expense	Other Miscellaneous Expense
Franchise Fee Amortization	Other Expense	Other Miscellaneous Expense

Appendix B - Weekly Royalty & Settlement Report

Weekly Settlement	
Beeline XXXX	
Franchise Entity Name	
Week Beginning	3/7/16
Week End	3/13/16

PAYMENT BY CATEGORY	
Service	1,500.00
Product	1,500.00
Sales Tax	135.00
Deposits	-
Total Payments	3,135.00

PAYMENT BY TYPE	SALES TAX	TOTAL
Credit Card	0.00	2,000.00
Cash	0.00	185.00
Check	5.00	500.00
To Be Invoiced	-	350.00
Partner Program	-	100.00
Credit Account	-	-
Referral Credit	-	-
Total Payments	35.00	3,135.00

Total Collected on Behalf of Franchisee (CC/PP)	2,100.00
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AMOUNTS DEDUCTIBLE TO FRANCHISOR	
Restock & Special Order Cost	750.00
Restock & Special Order Shipping Cost	100.00
Royalty	8% 240.00
Brand Promotion Fund	2% 60.00
BeeLink	75.00 40.38
Merchant Account (Credit Card) Fees	2.50% 50.00
Total Deductions	1,240.38

Settlement Payment (Collections @ Deductions)	859.62
Existing Credit Balance	-
Current Total Balance	859.62

QuickBooks Manual Journal Entry	Dr	Cr
Cash/Check Collected/Pending Deposit	85.00	
Weekly Settlement Clearing	59.62	
Weekly Amounts To Be Invoiced	50.00	
Sales/Product Revenue		500.00
Service Revenue		500.00
Sales Tax Payable		35.00
Deposits Liability		-
Inventory	50.00	
Freight & Delivery	0.00	
Franchise Royalty	40.00	
Brand Advertising Fee	60.00	
BeeLink Fee	40.38	
Merchant Account (Credit Card) Fees	50.00	
Accounts Payable	-	-
Total	135.00	135.00

Invoices to Be Created (Action Items)	
Invoices to Create	50.00

Appendix C - Bookkeeping

Bookkeeping

Note: Franchisees must obtain their own tax and accounting advice. In no manner will Beeline provide attest services (audit, compilation, or review), tax services (federal, state, or local), or provide tax audit support. Beeline Bikes provides limited support for bookkeeping services solely to assist the franchisee in recording business transactions. Franchisee is responsible for recording entries, providing supporting documentation as needed and completing a monthly checklist provided by Beeline Bikes.

Beeline Bikes bookkeeping services consist of the following:

- Assisting Franchise in setting up QuickBooks consistent with a standard chart of accounts and assisting Franchisee in connecting its bank account and/or credit card to the Quickbooks system.
- Providing a record activity of weekly activity in the form of the from weekly settlement statement for franchisee to input into QuickBooks
- Responding to franchisee questions regarding bookkeeping matters specific to information provided by Beeline Bikes.

Appendix D – Minimum Tools List

Brand	Description	Detailed Description	Quantity
Fiskar	Scissors	Tool, Fiskar 8 Inch Original Scissor	1
Fiskar	Scissors	Tool, Fiskar 8 inch All Purpose Left-Handed Scissor	0
Maglite	Flashlight	Tool, Maglite SP+P01H Mini PRO+ LED 2Cell AA Flashlight Black	1
Stanley	Standard/Metric Tape Measure	Tool, Stanley 33-158 Tape Measure 5m	1
Stanley	Large Deep Organizer	Tool, Stanley 10 Compartment Professional Deep Organizer	2
Husky	Large Parts Organizer	Tool, Husky 14 inch Parts Bin Organizer	3
Husky	Medium Parts Organizer	Tool, Husky 11 inch Parts Bin Organizer	0
Husky	Small Parts Organizer	Tool, Husky 7 Inch Parts Bin Organizer	0
Feedback	Digital Calipers	Tool, Feedback Sports Digital Caliper	1
EVO	Shock Pump	Pump, EVO E-Force Shock Pump	1
Hozan	Fourth Hand	Tool, Hozan 4Th Hand C-356	1
Hozan	Lockring Tool	Tool, Hozan Lockring Wrench C-205	1
MKS	Test Ride Pedals	Pedal, MKS Sylvan Touring Silver	1
Park	R-Sys Compatible Spoke Wrench	Tool, Park SW-12 Spoke Wrench Mavic	1
Park	Kysrium Compatible Spoke Wrench	Tool, Park SW-13 Spoke Wrench For Mavic Wheels 6-Spline	1
Park	Truing Stand	Tool, Park TS-2.2 Pro Wheel Truing Stand	1
Park	Truing Stand Base	Tool, Park Adjustable Base For TS-2.2	1
Park	Black Spoke Wrench	Tool, Park SW-0 Spoke Wrench-14G Black	1
Park	Red Spoke Wrench	Tool, Park SW-2 Spoke Wrench-16G Red	1
Park	4,5,6 Mm Three Way	Tool, Park AWS-1 Hex Wrench 4,5,6mm	1
Park	2,2.5,3 Mm Three Way	Tool, Park AWS-3 Y Hex Wrench 2,2.5,3mm	1
Park	Torx Three Way	Tool, Park TWS-3 Torx 3-Way	1
Park	13Mm Cone Wrench	Tool, Park SCW-13 Cone Wrench 13.0mm	2
Park	14Mm Cone Wrench	Tool, Park SCW-14 Cone Wrench 14.0mm	2
Park	15Mm Cone Wrench	Tool, Park SCW-15 Cone Wrench 15.0mm	2
Park	16Mm Cone Wrench	Tool, Park SCW-16 Cone Wrench 16.0mm	2
Park	17Mm Cone Wrench	Tool, Park SCW-17 Cone Wrench 17.0mm	1
Park	18Mm Cone Wrench	Tool, Park SCW-18 Cone Wrench 18.0mm	1
Park	19Mm Cone Wrench	Tool, Park SCW-19 Cone Wrench 19.0mm	1
Park	Campy Cassette Lockring/Bb Tool	Tool, Park BBT-5/FR-11 BB/Lockring Tool	1
Park	Isis 8 Spline	Tool, Park BBT-18 For 8-Notch ISIS Cups	1
Park	External BB Tool	Tool, Park BBT-19.2 Bottom Bracket Tool	0
Park	External BB Tool	Tool, Park BBT-9 Shimano Hollowtech II	0
Park	External BB Tool	Tool, Park BBT-69 16 Notch 44mm 3/8 Drive Blue	0
Abbey Tool	External BB Tool	Tool, Abbey Single Sided Bottom Bracket Socket	1
Park	Shimano Ultegra BB Tool	Tool, Park BBT-59 16 Notch 41mm 3/8 Drive Gray	0
Abbey	Shimano Dura Ace/Ulterga BB Tool	Tool, Abbey Dual Sided Bottom Bracket Socket	1
Park	Shimano Dura Ace BB Tool	Tool, Park BBT-49 16 Notch 39mm 3/8 Drive Black	0
Park	Chain Tool	Tool, Park CT-3.2 Chain Breaker	1
Park	Chain Tool	Tool, Park CT-4.3 Master Chain Tool W/Peening	0
Park	Replacement Pins For Chain Tool	Tool, Park CTP-C Chain Tool Pins Card/2	1
Park	Replacement Pins For Chain Tool	Tool, Park CTP-4K Pin Replacement Kit for CT-4 CT-11	0
Park	Rotor Truing Tool	Tool, Park DT-2 Rotor Truing Fork	1
Park	Shimano Freewheel Tool, 8 Speed Compatible	Tool, Park FR-1.2 Freewheel Remover	1
Park	Suntour Freewheel 2 Notch	Tool, Park FR-2 FW Remover-Suntour 2Notch	1
Park	Suntour Freewheel 4 Notch	Tool, Park FR-3 FW Remover-Suntour 4Notch	1
Park	Schwinn/Atom/Regina Fw Tool	Tool, Park FR-4 FW Remover Atom/Regina	0
Abbey Tool	Shimano Cassette Lockring Tool	Tool, Abbey Crombie Single Sided Shimano	1
Park	Bmx Fw 4 Notch Tool	Tool, Park FR-6 FW Remover F/BMX 4 Notch	1
Park	Falcon Freewheel Tool	Tool, Park FR-7 Falcon Freewheel Remover	1
Park	BB Tool HCW-11	Tool, Park HCW-11 Bottom Bracket	1

Park	BB Tool HCW-4	Tool, Park HCW-4 36mm Crank & BB Wrench	1
Park	Headset Wrench 32Mm/36Mm	Tool, Park HCW-15 Headset Wrench 32.0mm And 36.0mm	2
Park	MasterlinkPliers	Tool, Park MLP-1.2 Master Link Pliers	1
Park	Offset Brake Wrench	Tool, Park OBW-4 Offset Brake Wrench	1
Park	Disc Brake Piston Press	Tool, Park PP-1.2 Hydr Brake Piston Press	1
Park	Pedal Wrench	Tool, Park PW-4 Pro Pedal Wrench	1
Park	Pedal Wrench	Tool, Park PW-3 Pedal Wrench	0
Park	Threadless Saw Guide	Tool, Park SG-6 ForkSawGuide-Threadless	1
Park	Oversized Seatpost Cutting Guide	Tool, Park SG-7.2 Saw Guide Oversized	0
Park	Green Pin Spanner	Tool, Park SPA-1 Green Pin Spanner	1
Park	Red Pin Spanner	Tool, Park SPA-2 Red Pin Spanner	1
Park	Chainwhip 11 Speed Compatible	Tool, Park SR-11 Chain Whip/Sprocket	1
Park	Chainwhip 1/8" Compatible	Tool, Park SR-18 Chain Whip 1/8	1
Park	Pedal TapSet 9/16"	Tool, Park TAP-6 9/16" Pedal Right&Left	1
Park	3Mm X .5 Tap	Tool, Park TAP-7 R Dropout Screws 3mmX0.5	1
Park	5Mm X .8 Tap	Tool, Park TAP-8 Bottle/Rack 5mmX.8	1
Park	6Mm X 1 Tap	Tool, Park TAP-9 Canti Bosses 6mmX1	1
Park	10Mm X 1 Tap	Tool, Park TAP-10 R. Der. Hanger 10mmX1	1
Park	Tap Handle	Tool, Park TH-2 Tap Handle	1
Irwin	Tap Handle Small	Tool, Irwin T-Handle 1/4 Inch Tap Wrench 12001	1
Park	Star Nut Setter	Tool, Park TNS-4 Threadless Nut Setter	1
Park	Axle Adapters For Truing Stand	Tool, Park TS-2TA Thru Axle Adaptors For	0
Abbey Tool	Axle Adapters For Truing Stand	Tool, Abbey Geiszler Truing Stand Adaptor	1
Park	Bladed Spoke Holder	Tool, Park BSH-4 Bladed Spoke Holder	1
Park	Spoke Wrench For Shimano Wheels	Tool, Park SW-14.5 Spoke Wrench 4.4mm/3.75mm	1
Park	Spoke Ruler	Tool, Park SBC-1 Spoke Ruler	1
Pedros	Cartidge BB Tool, ISIS Compatible	Tool, Pedro's Splined Bottom Bracket Socket For Shimano and ISIS Drive Splined BB Cups	1
Shimano	Hydraulic Funnel For Disc Brakes	Tool, Shimano TL-BT03-S Disc Brake Bleed (2nd version)	1
Pedros	Tire Levers	Tool, Pedros Tire Levers Card/2 Yellow	0
Park	Valve Core Tool	Tool, Park VC-1 Valve Core Tool	1
Stanley	Ball Peen Hammer 12Oz	Tool, Stanley 54-012 Ball Peed Hammer 12oz	1
Beeline	Spoke Roll	Tool, Beeline Spoke Roll	1
Lezyne	High Pressure Pump	Pump, Lezyne Steel Floor Drive ABS-2 Black	1
Shimano	Crank Puller, Compatible With Threaded Spindles	Tool, Shimano TL-FC10 Crank Arm Extractor	1
Shimano	Hollowtech li Cap Tool	Tool, Shimano TL-FC16 Crankset Arm Installation	1
Shimano	Chainring Nut Wrench	Tool, Shimano TL-FC21 Crank Dustcap Pin Tool With Chainring Nut Tool	1
Park	14Mm Socketed Wrench	Tool, Park CCW-5 Crank Bolt Wrench	1
Abbey Tool	Hanger Allignment Tool	Tool, Abbey HAG Derailleur Hanger Alignment Gauge	1
Park	Campy 6.0Mm Spoke Wrench	Tool, Park SW-11 Spoke Wrench	1
Dualco	Grease Gun	Tool, Dualco Grease Gun with Short Nozzle	1
Roloff	Chain Checker	Tool, Rohloff Caliber 2 Chain Wear Indicator	1
Shimano	Crank Puller Adapter For Octalink/ISIS	Tool, Shimano TL-FC15 Extension	1
Pro	Torque Wrench	Tool, Pro Torque Wrench Adjustable 3-15 Nm	1
Bluepoint	Set Combination Wrench 8Mm-19Mm, Twelve Point	Tool, Blue Point 12 Piece Combination Wrench Set 8mm - 19mm	1
Bluepoint	3/8" Ratchet	Tool, Blue Point 3/8 Inch Soft Grip Ratchet	1
Bluepoint	1/2" Breaker Bar	Tool, Blue Point 1/2 Inch Breaker Bar	1
Snapon	Diaganol Cutters	Tool, Snap-on 7 Inch Diagonal Cutter	1
Snapon	Dead Blow Mallet 32Oz.	Tool, Snap-on 32oz Dead Blow Hammer	1
Snapon	T Handle Allen Set 2Mm-10Mm	Tool, Snap-on Metric Hex Wrench Set 2mm - 10mm	1
Snapon	Socket Set 8Mm - 19 Mm Twelve Point 3/8 Drive	Tool, Snap-on 12 Point Socket Set 8mm - 19mm	1
Snapon	Small Flat Head Screwdriver	Tool, Snap-on 3/16 Flat Head Screw Driver Red	1
Snapon	Medium Flat Head Screwdriver	Tool, Snap-on 1/4 Flat Head Screw Driver Red	1
Snapon	Phillips #1	Tool, Snap-on No 1 Philips Screw Driver Red	1
Snapon	Phillips #2	Tool, Snap-on No 2 Philips Screw Driver Red	1
Wiha	Mini Flat Head Screwdriver	Tool, Wiha 26040 4.0mm Flat Head Screw Driver	1
Wiha	Mini Philips Head Screwdriver	Tool, Wiha 26105 #0 Philips Screw Driver	1

Bahco	Hacksaw	Tool, Bahco Hacksaw 319	1
Bahco	Spare Hacksaw Blades, 32 Tooth	Tool, Bahco 32t Bi-Metal Hacksaw Blade	1
Bondhus	Torx Wrench Set T9-T40	Tool, Bondhus L-Wrench Torx Set T9 - T40	1
Wiha	Torx Wrench Set T9-T40	Tool, Wiha 36699 L-Wrench Torx Set T5 - T50	0
Bondhus	Allen Wrench Set 1.5 - 10Mm	Tool, Bondhus Hex Wrench Set 1.5mm - 10mm	1
Bondhus	6Mm Allen Wrench	Tool, Bondhus Allen Wrench 6mm	1
Bondhus	5Mm Allen Wrench	Tool, Bondhus Allen Wrench 5mm	1
Bondhus	4Mm Allen Wrench	Tool, Bondhus Allen Wrench 4mm	1
Bondhus	1.27Mm Allen Wrench	Tool, Bondhus Allen Wrench 1.27mm	1
Park	11Mm Allen Wrench	Tool, Park HR-11 Hex Wrench 11mm	1
Park	12Mm Allen Wrench	Tool, Park HR-12 Hex Wrench 12mm	1
Park	14Mm Allen Wrench	Tool, Park HR-14 Hex Wrench 14mm	1
Lifu	Extra Long 8mm Allen	Tool, Lifu Coated 8mm Long Hex Wrench	0
Bondhus	Imperial Allen Wrench Set	Tool, Bondhus Imperial Hex Wrench Set	1
Channellock	Slip Joint Pliers	Tool, Channellock Slip Joint Plier	1
Channellock	Needle Nose Pliers	Tool, Channellock 6" Long Nose Pliers	1
Channellock	V-Jaw Pliers	Tool, Channellock 12" V-Jaw Pliers	1
Channellock	12" Adjustable Wrench	Tool, Channellock 12" Adjustable Wrench	1
Channellock	6" Adjustable Wrench	Tool, Channellock 6" Adjustable Wrench	1
Felco	Cable Cutters	Tool, Felco C7 Cable Cutter	1
Lifu	8-9-10 Socketed Three Way	Tool, Lifu Socket Three Way Wrench 8mm 9mm 10mm	1
ICE	3.2Mm Nipple Wrench	Tool, Ice Square Nipple Driver 3.2mm	1
Jet Lube	Jet Lube Bottle For Mineral Oil	Tool, Beeline Squeeze Jet Lube Bottle	1
Wolverine	Tube Reamer Internal/External	Tube reamer internal/external	1
UBS	Dental Pick	Tool, Beeline 8" Dental Pick Set	1
Wiha	T-25 Torx T Handle	Tool, Wiha Torx Soft Grip T-Handle T25	1
Wiha	3/16 Driver	Tool, Wiha 26547 3/16" Nut Driver	1
Wiha	5.0Mm Driver	Tool, Wiha 26550 5.0mm Nut Driver	1
Wiha	5.5Mm Driver	Tool, Wiha 26555 5.5mm Nut Driver	1
Williams	1/2" To 3/8" Adapter	Tool, Williams 1/2" To 3/8" Drive Adapter	1
Williams	3/8" Extension	Tool, Williams 3/8 Extension 6" Polished	1
Schmidt	Half Round Bastard File	Tool, Schmidt 10" Half Round Bastard File	1
Beeline	File Holder	Tool, Beeline File Handle For 10"	1
Beeline	Spray Bottles	Tool, Beeline Spray Bottle 32oz	2
Beeline	Recycling Bin	Hardware, Beeline 7 Gallon Recycling Bin Blue	1
Beeline	Magnet, Telescoping	Tool, Beeline Telescoping Magnet 10lb	1
Bluepoint	10Mm Long Socket For Ut Bb	10mm hex bit long, 3/8" drive	1

Appendix E - Corporate Programs Information

Corporate programs provide great value to a Franchisee because they:

- Are a recurring source of business
- Provide free marketing to employees who may become consumer customers
- Help offset seasonality with their recurring nature
- Generate house call appointments in the area
- Provide “corporate” credibility to the Beeline offering
- Add legitimacy to the Beeline brand

Corporate Process:

1. Create Target Company List (to be finalized 4 weeks before soft open)
 - a. Provide Beeline Support with a list of target companies in your territory
 - b. Web search for top employers in your territory
 - c. Research online corporate supporters of cycling events or coalitions
 - d. Investigate if there is a corporate cycling club and network
2. Find contacts at target companies
 - a. Job titles that help: Facilities Manager, HR coordinator, Benefits Coordinator, Employee Perks, Transportation Manager, Bike Club Leader, Wellness Coordinator, Office Administrator
 - b. Keep an eye out for senior executive customers who might be able to help/sponsor getting you in.
 - c. Informally network with your customers to find out where they work and if Beeline might be a fit there
 - d. Obtain: name, title, email, phone
3. Reach out to contacts (Goal: determine an initial date)
 - a. Use Beeline provided corporate programs template via email
 - b. phone conversation to describe/sell service options (see Beeline conversation notes)
 - c. Set in-person meeting with Mobile Bike Shop
 - d. repeat a-c weekly until date on calendar
4. Onboard new company (once initial date is set)
 - a. Complete onboarding form (7 items)
 - b. Set recurring schedule (weekly, monthly, quarterly)
 - c. Finalize & book appointments in BeeLink system
5. Ongoing & annually:

- a. Monitor performance at corporate accounts and adjust frequency as necessary
- b. Ensure you always have future events on the calendar
 - i. Best practice is to schedule visit for the entire calendar year
 - ii. Some companies will only book a couple months out so you will need to be proactive in scheduling future events
 - iii. At the end of each year (in October) setup appointments for the following year (Beeline Support can help you with this process)
- c. For under performing sites consider:
 - i. suggesting a 3 to 4 bike minimum
 - ii. move to a shortened schedule to enable consumer house call visits on either side of the corporate visit (ie. 11am start time - be sure to limit the number of bikes)
 - iii. Keep the landing page up but as a referral for home service only

What Beeline will do:

- 1. Provide communications templates & training
 - a. Provide corporate account collateral that you can send to your corporate contact so that they can help get the word out.
 - b. Compare with existing Beeline accounts & make introductions to local staff
 - c. Perform LinkedIn outreach at your request
 - d. Send automated reminder emails (14 days and 2 days) to corporate contact
 - e. Selectively send emails and outbound communications as requested to support your efforts

What you need to do:

- 1. You need to be the driver of this process. Beeline is there to help and support you but ultimately the success of your corporate visits depends on you building a relationship with the facilitators, ambassadors and cyclists at the company.

Key Background & Pointers:

Ultimately getting corporate appointments is the franchisee's responsibility, Beeline provides content and support to help facilitate this process.

Mutual acquaintances are your best bet for getting into a company. If you know or can meet someone that works at this company, leverage that contact. Ask for an introduction email to their Facilities Manager or HR coordinator and start a conversation. Before you ask for that intro, tell them why you think Beeline should be at their company. Selling

them on why our service should be of value to them could determine how likely they are to make that intro.

Networking with other mobile vendors to share customer contacts can also be an effective tactic - seek out mobile vendors in your area to team up.

Cold calling the front desk and asking to be put in contact with facilities or HR is an option.

Target people that work in commercial real estate or property managers - they may have an incentive to keep their tenants happy with an onsite service like Beeline.

Selling Tips:

Once you've established contact with someone about bringing a truck out, they'll often have questions about how our service works and what it will cost their company. In most cases this contact will need to get approval from someone above them to have us onsite so giving them options on cost is key. They'll usually have budget restrictions to adhere to.

Lead off with employee Direct Pay and note that its free to the company. This removes the potential sticker shock reaction they might have with starting off with our Subsidized option. You may have the opportunity to upsell a Subsidized visit and some companies are willing to support more bike commuting at your company. After pitching the direct pay option try something along the lines of 'If (company name) would like help their employees out by covering the labor cost of full tunes, our subsidized payment plan is a great way to introduce a new employee perk.'

Potential Hang ups:

- 1) Company requires a contract/access agreement
- 2) Insurance requirements are in excess of Beeline coverage
- 3) Parking logistics (company must have a location for you to park)
- 4) Low turnout: consider decreasing frequency or networking with other contacts to help get the word out