

FM REFERENCE GUIDE (Front)

STORE # & ADDRESS: _____

SET-UP DAY: _____

EVENT DATES: _____

REGIONAL MANAGER & CELL: _____

PRE-EVENT

3 Hours

- Train: 1-hr call w/ Regional Manager
- Review manual & brand training docs
- Confirm location, date & times
- Confirm BA staff info
- Confirm assets shipped to you (TV, Fridge, Shirt, Brochures)

SET-UP

Night Before- 8p-11p

- Check in w/ Costco floor manager (red vest)
- Confirm 4 pallets on floor
- Build: Desk → Backdrop → TV Stand → Product Pallets → Final Display
- Condense 4 pallets into 2 + display
- Plug in Jackery units & fridge overnight
- Submit setup photos (front/back/backstock) + clock-out photo

EVENT DUTIES

Daily- 1-2 Hours

- Daily Site Check (stagger times): Mystery shop (5m) → Introduce yourself (10m) → Inventory count (30m) → Submit recap + photos (30m)
- Submit 10-15 photos/day (check-in, selfie w/ BA, customer engagement, 4-side table check)
- Complete & submit Daily Report (program details, staff eval, inventory, sales, KPIs)
- Day 1 only: Verify SKUs scan correctly at register

BREAK-DOWN

Last Day- 6pm-8pm

- Meet labor support at entrance
- Soft load-out: pack samples while store open
- Break down booth once store closes & Costco OKs
- Final inventory count on legible sheet
- Submit photos of inventory, pallets & packed booth
- Wait for RM approval before leaving site

BOOTH INVENTORY

- Desk
- Backdrop
- Mini Pallet Skirt
- TV Stand
- Tools (screws / stickers)
- 32" TV
- Mini-Fridge
- Flyers
- T-Shirt
- Acrylic Table Table Sign + Leaflet
- USB, Badge Hanger to BA

PRODUCT INVENTORY

- Jackery Fridge Guard
- Jackery Explorer 1500 v2
- Jackery 1000 W Air
- Jackery Home Power 3600 Plus
- Jackery Home Power 3600 Plus Battery Pack
- Jackery Explorer 5000 Plus
- Jackery Home Power 5000 Plus Battery Pack
- Jackery Solar Saga 500W Air Solar Panel

ROADSHOW PACKAGES

- HP3600Plus+500W: \$1999.99
- HP3600Plus+BPx3: \$3699.99
- E5000Plus+E5000Plus Battery Pack: \$4669.99
- HP3600Plus: \$1359.99

REPORTING SUMMARY

Submit All Pictures to
WhatsApp Group

Submit Daily Recap to
Google Form Here:
<https://forms.gle/5zTsNYRd7jRGP7WF7>

05 EVENT DUTIES

Overview: 10-Day Schedule

During the 10-day Roadshow, conduct a site check and complete a report **every day**. Each shift takes 1-2 hours - stagger them so staff do not expect you at a certain time.

THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN
SET-UP	D1	D2	D3	D4	D5	D6	D7	D8	D9	D10

SET-UP 8pm-11pm Thu | 1-2 HR SITE CHECK daily | DAY 10: 4-6pm check + 6-8pm Break-Down

SET-UP (THU)

8pm-11pm Set-Up

5am-8am Set-Up on Day 1 if necessary

DAYS 1-9

1-2 HR SITE CHECK

Each shift should take 1-2 hours

DAY 10 (SUN)

4PM-6PM SITE CHECK

6pm-8pm Break-Down

01 WELCOME

Your Role as Field Manager



As the Field Manager, you are the on-site leader representing both **D-Liteful** and **Jackery**. Your responsibility is to ensure every 10-day Costco Roadshow is set up correctly, operates smoothly, and delivers an exceptional experience for Costco members.

KEY RESPONSIBILITIES



02 THE PROGRAM

The Timeline

Your role is divided into **4 key phases**, each with a specific set of responsibilities to ensure a successful Costco Roadshow. Over the next few slides, we'll walk through each phase and outline exactly what you'll need to do from start to finish.



07 RULES & COMPLIANCE

Costco Operational Compliance

1. Professional Conduct

- Represent D-Liteful, Jackery, and Costco professionally at all times.
- Arrive on time in the required professional uniform and maintain a neat, professional appearance.
- Maintain a respectful, cooperative, and professional attitude with Costco employees, Jackery personnel, and members.
- Follow all instructions from Costco management. If a Costco instruction conflicts with program procedures, comply with Costco first and notify your Regional Manager immediately.
- Never argue with Costco employees or members. Escalate any concerns to your Regional Manager.

2. Costco Operations

- Follow all Costco policies, procedures, and safety requirements.
- Use only approved entrances, exits, loading areas, and workspaces designated by Costco.
- Do not enter receiving, warehouse, or other restricted areas unless specifically authorized by Costco management.
- Leave the warehouse by **11:00 PM** following setup or breakdown. If re-entry is required after leaving the building, notify the Costco Night Manager before returning.

3. Safety & Housekeeping

- Keep aisles, emergency exits, fire equipment, and access routes clear at all times.
- Never move Costco fixtures, shelving, pallets, displays, or equipment without Costco approval.
- Do not use Costco equipment (including pallet jacks, forklifts, ladders, or other warehouse equipment) unless specifically authorized.
- Maintain a clean work area throughout setup and breakdown. Remove all boxes, shrink wrap, cardboard, zip ties, and other packaging materials before leaving.
- Immediately report any safety hazards, spills, accidents, or damaged property to Costco management and your Regional Manager.

04 SET-UP DUTIES

Set-Up & Photo Requirements

1 CHECK IN

- Take a **Check-In** Photo as soon as you arrive.
- Submit the photo to your **WhatsApp group**.
- Connect with Costco and confirm you are cleared to begin.

2 CONFIRM DELIVERY

- Confirm **all 4 pallets** are on-site.
- Take a clear photo of **each pallet** before opening or moving product.
- Confirm the expected inventory has arrived.
- Immediately report anything missing or damaged in WhatsApp.

3 BEGIN THE BUILD

- Start assembling the booth/display and organizing product.
- **Important:** Pallets may not be moved into their final position until Costco gives approval, typically between **9:00–11:00 PM**.
- Condense the **4 delivered pallets into 2 organized pallets + the finished display**.

4 KEEP TEAM UPDATED

- Send a brief **status update every 30 minutes** in your assigned WhatsApp group.
- Include a photo when helpful so the Regional Manager can see progress.
- Flag any issue that could delay completion **right away**– don't wait until the end.

5 POWER UP

- Plug the **Jackery into the mini-fridge** as directed.
- Plug in the **display Jackery and leave it charging overnight**.
- Confirm everything is powered and positioned correctly before leaving.

6 FINAL CHECK + CLOCK OUT

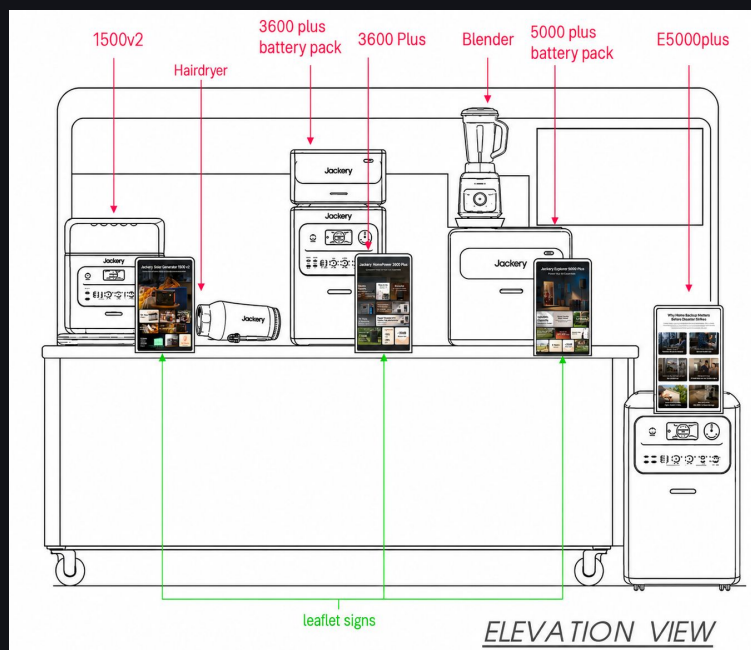
- Clean and organize the entire activation area.
- Take **Clock-Out Photos from all 4 sides** of the completed display.
- Submit all final photos in WhatsApp and wait for approval before leaving.
- If setup cannot be completed that evening, coordinate with your Regional Manager and **return between 5:00–7:00 AM** to finish.

IMPORTANT - SAVE YOUR BOXES: Take the empty TV box, mini-fridge box, and required product box(es) home. They will be needed for break-down and repacking.

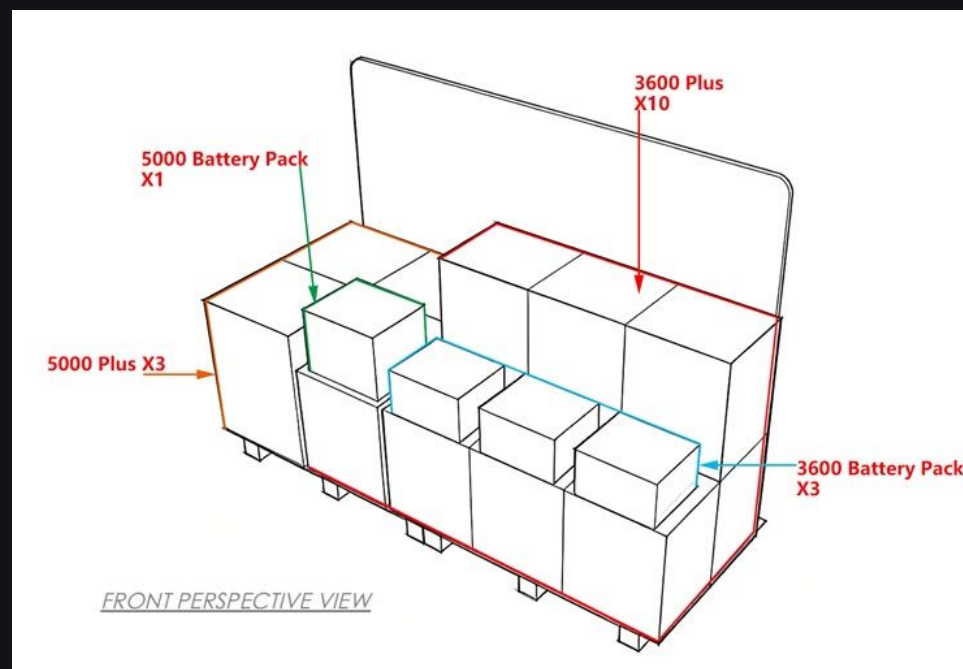
04 SET-UP DUTIES

Booth Layout:

FRONT (2 PALLETS)



BACKSTOCK (2 PALLETS)

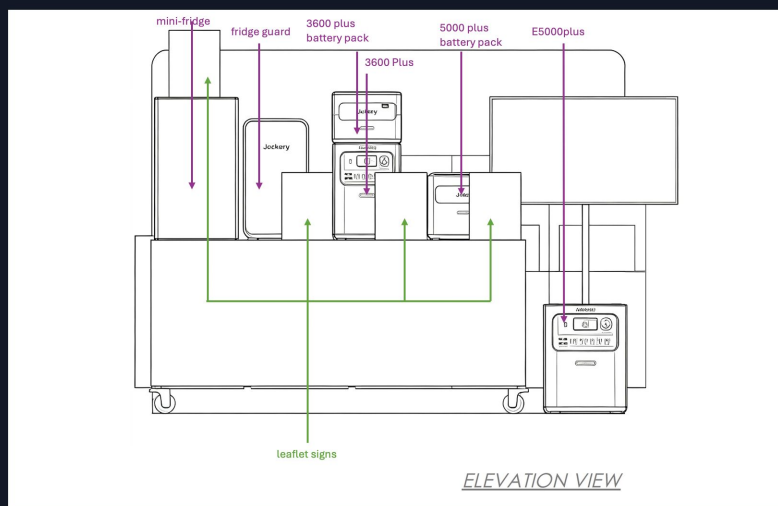


For more items, please stock at costco warehouse

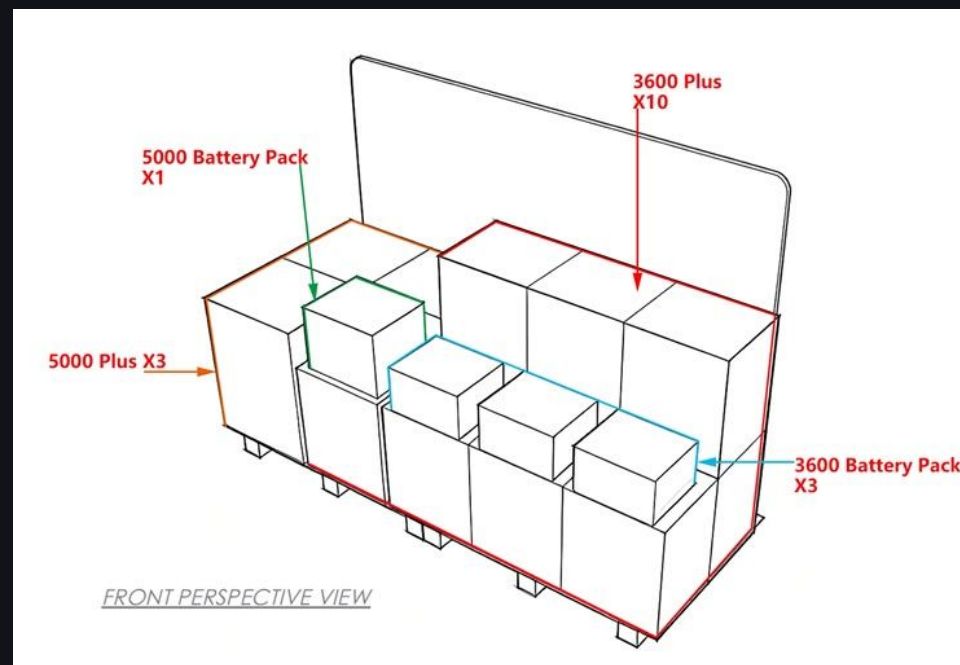
04 SET-UP DUTIES

Booth Layout (Alt)

FRONT (2 PALLETS)



BACKSTOCK (2 PALLETS)



For more items, please stock at costco warehouse

05 EVENT DUTIES

Submit Photos

In addition to your Check-In Photo, you are required to submit 10-15 pictures of each site check via WhatsApp
NO Customers' face photo

1

Check In Photos

This is the picture you submit as soon as you arrive to confirm you are on-site.

1

Selfie Photo

Please take a photo of you and the BA

5-10

Customer Engagements

Please take photos of Consumers engaging with the BA, Product and Table

4

Table Check

Please take Photos of all 4 sides of the booth



01 WELCOME

What Success Looks Like



**DISPLAY
LOOKS GREAT**



**INVENTORY IS
ACCURATE**



**BA IS
SUPPORTED**



**REPORTING IS
COMPLETE**



**COSTCO HAS A
GREAT EXPERIENCE**

08 SET-UP GUIDE

Step #5: Final Set-Up

Last step is to display all items on the table, including the TV and TV Stand ensuring all items are plugged in and ready.



Booth Set-Up



Alt Booth Set-Up (Stores w/out Fridgeguard)

06 BREAK-DOWN

Break-Down Duties

Timing: 6:00-8:00 PM, or after Costco closes Sunday Night

1 Meet the Labor Support

Meet the assigned labor person at the front entrance and confirm they are ready to assist.

2 Begin the Soft Load-Out

Pack samples and loose materials into boxes while the store is still open. Do not move the full booth until the gate is closed.

3 Break Down the Booth

Once approved, begin dismantling the booth assets and organizing everything securely on the designated pallet.

4 Complete the Final Inventory

Count all remaining products and materials. Write exactly what is left on each pallet on a legible paper and attach it to each pallet.

5 Take and Submit Photos

Photograph the completed inventory, labeled pallets and packed booth assets. Submit all photos through WhatsApp.

6 Wait for Final Approval

Do not leave the site until the Regional Manager reviews the photos and sends approval.

02

THE PROGRAM



07 RULES & COMPLIANCE

Costco Operational Compliance

4. Asset Protection

- Protect all Jackery displays, fixtures, equipment, and inventory at all times.
- Never leave Jackery assets unsecured during setup or breakdown.
- Report any damaged, missing, or malfunctioning equipment immediately.
- Ensure all displays, equipment, and materials are clean, secure, and properly positioned before leaving the warehouse.

5. Customer & Store Compliance

- Do not solicit customers or approach shoppers in the aisles. Interact only with members who naturally approach the demonstration area.
- Do not sell products on behalf of the Brand Ambassador.
- Respect Costco member privacy. Do not photograph customers' faces, confidential information, Costco offices, receiving areas, or restricted locations without authorization.
- Do not consume food or beverages on the sales floor unless approved as part of the demonstration.
- Do not play music or create unnecessary noise that may disrupt Costco operations.

6. Operational Support & Reporting

- Field Managers are responsible for setup, breakdown, operational inspections, asset management, inventory verification, and daily reporting.
- If the Brand Ambassador is absent from the booth for more than **15 minutes**, notify your Regional Manager immediately.
- Field Managers provide operational support but are **not** responsible for supervising or managing Brand Ambassadors.
- Complete all required photos, inventory checks, and operational reports before leaving each store.
- Immediately report any operational issues, Costco concerns, safety incidents, asset damage, inventory discrepancies, or compliance issues to your Regional Manager.

Failure to comply with Costco policies, Jackery program requirements, or these Field Manager Operational Guidelines may result in corrective action, removal from the program, or termination of your assignment.

05 EVENT DUTIES

Each Site Check Will Include 4 Steps

1

Mystery Shop + Check Code & Photo

10 MINS

Walk through the activation area for approximately five minutes before introducing yourself. Observe the overall setup, BA performance, customer engagement, and overall activation condition.

- Check and verify the required **code and photo**.
- Submit the required **check-in photo via WhatsApp**.

2

Greet the BA + Take a Selfie

10 MINS

Introduce yourself and greet the Brand Ambassador (BA) and team.

Take a selfie with the BA as proof of the site visit.

Gather key information and observations needed for the site recap.

Address any immediate operational issues or questions with the BA.

3

Complete Inventory Counts

20 MINS

Open and review all inventory boxes as required.

- Count each item by type.
- Compare the physical inventory against the inventory list.
- Record any missing, damaged, or incorrect items.

4

Submit Recap + Required Photos

30 MINS

Complete the site-check recap and take all required photos.

Submit the completed site-check recap.

Upload all required site photos. Clearly document any issues, discrepancies, or follow-up actions required.

FIRST DAY ONLY

During setup or the first site visit, confirm that each required item has an 8–9 digit ISS number and that all numbers match the provided records.

05 EVENT DUTIES

Check SKUs - First Day Only

On the first day, it is important that you check the SKU's to ensure that they will be properly scanned/priced when customers purchase the product during the Roadshow.

1 Bring Product to Register

Get a cart and bring the product box to the merchandisers' table near the registers.

2 Scan the Product

Scan the product box to confirm it rings up correctly in Costco's system.

3 Record the Item Number if Needed

If the product does not scan correctly, have the Brand Ambassador write the item number on a merchandiser slip.

4 Complete the Purchase

The customer will take the slip to the register and pay using the listed item number.

5 Verify the Receipt

After checkout, bring the receipt back to the Brand Ambassador to confirm that the correct item was charged.

6 Load the Product

Once the receipt is verified, the Brand Ambassador may place the product in the cart.

IMPORTANT: Do not place any product in the cart before the receipt has been checked, per Costco's request. Merchandiser slips are available at Costco.

05 EVENT DUTIES

Compile & Submit Daily Recap

Each Day, you will compile feedback and pictures and submit your information here: [RECAP LINK HERE](#)

PROGRAM DETAILS

- ☐ Store # & Location: _____
- ☐ Date: _____ Start Time: _____ End Time: _____

STAFF EVALUATION

- ☐ BA Name: _____
- ☐ Shift Hours: _____
- ☐ Attendance: ☐ Present ☐ Absent
- ☐ Product Knowledge (1-5): _____
- ☐ Customer Engagement (1-5): _____
- ☐ Brand Fit (1-5): _____

DAILY INVENTORY (Qty on Hand)= on floor + back warehouse

- ☐ Fridge Guard: _____
- ☐ E1500 v2 (if Fridge Guard unavailable): _____
- ☐ 100W Air(if Fridge Guard unavailable): _____
- ☐ HP3600 Plus: _____
- ☐ E5000 Plus: _____
- ☐ HP3600 Plus Battery Pack: _____
- ☐ E5000 Plus Battery Pack: _____
- ☐ Solar Saga 500W Air Solar Panel: _____

ESTIMATED SALES FROM DAY BEFORE= booth + inline / both data shall be from BA or check cashier if allowed

- ☐ HP3600Plus+500W (\$1999): _____
- ☐ HP3600Plus+BPx3 (\$3699): _____
- ☐ E5000Plus+BPx1 (\$4669): _____
- ☐ HP3600Plus (\$1359): _____

ESTIMATED KPI'S (Pull from BA)

- ☐ Estimated Booth Traffic: _____
- ☐ Estimated Booth Engagement: _____
- ☐ Estimated Interested Customers: _____

FIELD MANAGER FEEDBACK

Any additional comments/concerns:

FM Signature: _____

Date: _____

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REPORTING SUMMARY

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<https://forms.gle/5zTsNYRd7jRGP7WF7>

Thank You!

Let's make this Costco Roadshow a success - store by store.