



## SHADOW TRAINING

### Departmental Shadow Rollout and Business Continuity Support



During the live rollout, PringlePCS consultants will work alongside your employees at your premises, supporting them while Gekko Wholesale is being used in real working situations.

This practical, hands-on shadow coaching provides immediate guidance, reinforces the correct procedures and allows questions to be resolved as they arise. Rather than limiting training to a classroom demonstration, our consultants will observe how each department operates and help employees apply Gekko Wholesale to their actual daily responsibilities.

### Understanding Every Department of Your Business

Our objective is to develop a detailed understanding of how every department within your organisation operates, including its responsibilities, processes, pressures and dependencies.

#### By working directly with your employees, PringlePCS will build practical knowledge of:

- The responsibilities of each department
- The procedures employees are expected to follow
- How information moves between departments
- How Gekko Wholesale supports each stage of the operation
- The knowledge and skills required to perform each role
- Common problems, delays and areas of operational risk
- Opportunities to improve efficiency, accuracy and communication

This departmental knowledge enables PringlePCS to provide more than software support. We can help management train new employees, upskill existing employees, document important processes and provide additional assistance when a department is under pressure.

### Protecting Your Organisation Against the Loss of Key Employees

Many organisations become dependent on one experienced employee who holds essential knowledge about a department, customer, supplier or business process. When that person is absent or leaves the organisation, it can create disruption, delays and uncertainty.



The Departmental Shadow Rollout helps reduce this vulnerability by transferring knowledge into documented procedures, system-based workflows and structured training.

### **PringlePCS can assist with:**

- Training a replacement employee
- Onboarding a new member of staff
- Upskilling an existing employee to cover another role
- Cross-training employees between departments
- Creating role-specific guides and operating procedures
- Providing refresher training following employee absence
- Supporting a department during periods of increased workload
- Helping management identify where too much knowledge is held by one person
- Providing emergency operational guidance when a key employee is unexpectedly unavailable

**This gives management greater confidence that the organisation can continue operating smoothly when an employee is absent, changes role or leaves the business.**

Where appropriate and subject to availability, PringlePCS may also be brought in at short notice to help guide employees, support departmental processes and train new or existing members of staff.

### **Shadow Rollout: Sales and Customer Relationship Management**

As Gekko Wholesale includes comprehensive CRM functionality, PringlePCS will work alongside your sales team to ensure the system becomes an active sales and customer-management tool rather than simply a database containing customer details.

### **Our consultants can support your employees while they:**

- Create and maintain accurate customer and prospect records
- Record telephone calls, emails, meetings and sales activity
- Manage leads, opportunities and follow-up actions
- Check product availability and current prices
- Prepare quotations and convert them into customer orders
- Progress cold prospects into warm opportunities
- Convert sales opportunities into orders and invoices
- Review previous purchases and customer buying patterns
- Identify customers who have not ordered recently
- Schedule future calls, reminders and follow-up activity
- Maintain clear notes so another employee can continue a customer conversation
- Produce sales reports for managers
- Monitor individual and team sales performance



## **Practical Sales Coaching**

Where agreed, PringlePCS can work directly with your employees while they carry out prospecting and customer-development activity.

### **This can include guidance on:**

- Preparing for cold calls
- Introducing the organisation professionally
- Asking effective questions
- Identifying a customer's requirements
- Handling common objections
- Recording useful information within Gekko Wholesale
- Planning the next contact
- Turning an initial enquiry into a genuine sales opportunity
- Progressing an opportunity through to quotation, order and invoice

The purpose is not only to teach employees where to enter information, but also to help them understand how the CRM process supports consistent and effective sales activity.

## **Email Marketing and Mailshots**

PringlePCS can help your organisation use Gekko Wholesale to create targeted customer communications and mailshots.

### **Employees can be shown how to:**

Select customers using relevant criteria

- Create targeted contact lists
- Send personalised sales messages to multiple customers
- Promote specific products, services or special offers
- Contact customers based on their previous purchasing activity
- Create professional email content
- Maintain accurate marketing preferences and contact details
- Record and manage responses and follow-up actions

Where supported by the agreed configuration, personalised communications can be prepared and sent to selected customers with only a small number of actions, helping the sales team communicate more consistently and efficiently.

## **Social Media and Campaign Support**

Additional consultancy can also be provided to help your organisation plan and manage coordinated sales and social-media campaigns.

### **Support can include:**

- Developing campaign ideas
- Creating written promotional content
- Planning a campaign calendar
- Coordinating email and social-media messages
- Promoting new products or services
- Identifying suitable customer groups
- Recording campaign-generated leads in Gekko Wholesale
- Monitoring enquiries, opportunities and resulting sales



### **Shadow Rollout: Order Processing**

PringlePCS will work alongside the employees responsible for receiving, entering and processing customer orders.

Your team will receive practical guidance while using Gekko Wholesale during normal business operations, helping them process orders accurately, consistently and efficiently.

#### **Support can include:**

- Finding or creating the correct customer account
- Checking customer details before processing an order
- Reviewing account status and agreed credit arrangements
- Confirming product descriptions, quantities and prices
- Checking current product availability
- Identifying insufficient or unavailable stock
- Recording customer purchase-order references
- Applying authorised discounts
- Producing order confirmations
- Processing part-orders and back orders
- Adding delivery or collection instructions
- Communicating order requirements to warehouse employees
- Converting completed orders into delivery notes and invoices
- Correcting mistakes using the agreed authorisation process
- Maintaining clear order notes and an accurate audit trail

**PringlePCS will also help employees understand how decisions made during order processing affect stock control, purchasing, picking, delivery, invoicing and customer service.**



### Shadow Rollout: Purchasing

Your purchasing team will receive practical support while creating purchase orders, reviewing stock requirements and managing supplier-related processes.

Our consultant will help employees follow your agreed purchasing procedures using Gekko Wholesale.

#### Support can include:

- Reviewing current stock levels
- Identifying products approaching their minimum stock level
- Checking customer demand and outstanding orders
- Reviewing previous product usage and purchasing history
- Selecting the correct supplier
- Reviewing supplier prices and lead times
- Preparing and authorising purchase orders
- Sending purchase orders to suppliers
- Recording expected delivery dates
- Monitoring outstanding supplier orders
- Receiving goods against a purchase order
- Recording shortages, damaged goods or incorrect deliveries
- Updating purchase prices where authorised
- Maintaining accurate supplier records
- Reviewing purchasing reports and supplier performance

PringlePCS will help ensure purchasing decisions are supported by reliable information rather than guesswork, reducing the risks of over-ordering, under-ordering and unnecessary stock waste.

### Shadow Rollout: Picking, Checking and Dispatch

PringlePCS will support warehouse employees while they use Gekko Wholesale to pick, check and complete customer orders.

This helps employees become familiar with the new workflow while practical and operational questions are addressed during live use.

#### Support can include:

- Accessing the correct picking information
- Identifying the required product and storage location
- Picking products in the correct quantity and unit of measure
- Recording products that are unavailable, damaged or substituted
- Checking picked items against the customer order
- Preventing incorrect quantities or products from being dispatched
- Recording completed picks
- Producing delivery and dispatch documentation
- Escalating stock differences to the appropriate employee
- Completing an order in line with the agreed process
- Maintaining traceability and accountability throughout the picking process

Our consultant can observe the full process, from the original customer order through to picking and completion, helping identify unnecessary duplication, delays or areas where mistakes are most likely to occur.



### Shadow Rollout: Stock Control

Accurate stock control is one of the most important parts of a wholesale operation. Poor stock information can lead to missed sales, unnecessary purchasing, customer disappointment, excessive waste and reduced profitability.

PringlePCS will work side by side with the employees responsible for maintaining accurate stock information and help establish reliable daily, weekly and periodic stock-control procedures.

#### Support can include:

- Stock receipts
- Stock movements
- Stock transfers
- Stock adjustments
- Stock checks
- Cycle counts
- Full stocktakes
- Product availability
- Minimum and maximum stock levels
- Stock-level reviews
- Damaged or expired stock
- Waste and write-offs
- Missing or unaccounted-for stock
- Product returns
- Correct use of Gekko Wholesale stock-control functions

### Product Units and Packaging

Wholesale products may be purchased, stored and sold using different units. For example, a product may be handled as an individual item, pack, case, box, tray, crate or pallet.

#### PringlePCS will help your team configure and follow clear procedures for:

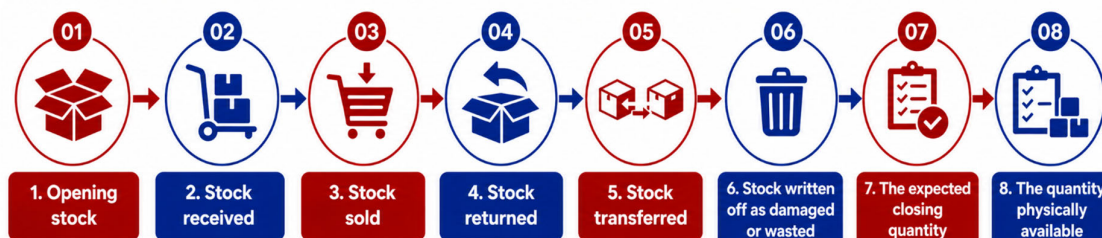
- Recording the correct purchasing unit
- Recording the correct sales unit
- Converting cases or crates into individual items
- Preventing confusion between single items and full cases
- Maintaining accurate quantities when packaging is opened
- Applying the correct cost and selling price to each unit
- Recording stock stored across different warehouse locations
- Understanding how unit errors affect stock value and profitability



### Daily and Weekly Stock Reviews

Employees can be shown how to complete regular stock reviews at the end of a day, week or agreed trading period.

**These reviews can help the organisation compare:**



**This allows unexplained differences to be identified and investigated quickly, rather than being discovered several months later during a full stocktake.**

### Waste, Loss and Shrinkage

Gekko Wholesale can help the organisation distinguish between stock that has been sold, wasted, damaged, returned, transferred or lost. PringlePCS can help employees establish the correct process for recording each type of movement so management can understand why stock levels have changed.

#### Accurate recording supports:

- Better purchasing decisions
- Reduced over-ordering
- Reduced waste
- Improved stock availability
- More accurate profit reporting
- Early identification of unusual stock differences
- Greater accountability throughout the stock-handling process

#### Independent and Unscheduled Stock Checks

PringlePCS can also be commissioned to support planned or unannounced stock spot checks. An independent stock check can provide management with an additional level of assurance by comparing the physical stock against the information recorded in Gekko Wholesale.

#### This can help identify:

- Incorrect unit conversions
- Products stored in the wrong location
- Unrecorded waste or damage
- Picking and order-processing errors
- Incorrect stock adjustments
- Weaknesses in internal procedures
- Unexplained stock losses
- Potential theft or deliberate misuse

Although no stock-control process can completely eliminate every risk, independent checks, clear audit trails and regular reconciliation can significantly reduce the opportunity for errors, loss and internal theft.



### Shadow Rollout: Accounts, Credit Control and Financial Reporting

PringlePCS will provide practical support to your accounts and administration employees as they begin using the relevant financial, customer-account and reporting functions.

The purpose is to help employees understand how daily activity within Gekko Wholesale affects the organisation's financial position and management information.

#### Support can include:

- Creating and maintaining customer accounts
- Reviewing customer balances
- Producing sales invoices
- Processing credit notes
- Recording customer payments
- Reviewing unpaid and overdue invoices
- Producing aged-debt reports
- Monitoring customer credit limits
- Placing accounts on hold where authorised
- Reviewing sales and invoice values
- Identifying outstanding supplier commitments
- Producing reports for management
- Exporting agreed information for further financial analysis
- Maintaining accurate transaction records and audit trails

#### Understanding Company Performance

PringlePCS can show management and authorised employees how to use Gekko Wholesale to gain a clearer understanding of business performance.

Depending on the agreed system configuration and the quality of the information entered, reports can help the organisation review:

- Total sales
- Invoiced revenue
- Outstanding customer balances
- Overdue invoices
- Available customer credit
- Sales by customer
- Sales by product or product group
- Gross profit and product margin
- Stock value
- Purchasing activity
- Customer buying trends
- Employee or departmental performance

Current orders and expected future income

This gives management access to timely operational information rather than relying entirely on reports produced after the end of an accounting period.

### Supporting Your External Accountant or Bookkeeper

With management approval, PringlePCS can help establish appropriate access for your accountant, bookkeeper or payroll provider.

Access should be restricted so that each external adviser can only view or work with the information required for their responsibilities.

This may allow an authorised accountant to:

- Review sales invoices and credit notes
- Access agreed financial reports
- Check transaction information required for VAT preparation
- Review customer and supplier balances
- Export relevant information into an accounting system
- Investigate discrepancies with authorised employees
- Obtain agreed payroll-related information where applicable

All access should be controlled through individual user accounts, suitable permissions and agreed data-protection procedures. This provides the adviser with the information they need without unnecessarily exposing confidential operational or customer information.

### Departmental Guides and Training Materials

As departmental procedures are agreed and refined, PringlePCS can help create supporting materials for future employees.



These materials help protect the knowledge gained during implementation and make it easier to train employees consistently in the future.

### **Flexible First Aid and Workplace Training**

PringlePCS can also arrange First Aid and other workplace training around your organisation's actual operating hours and shift patterns.

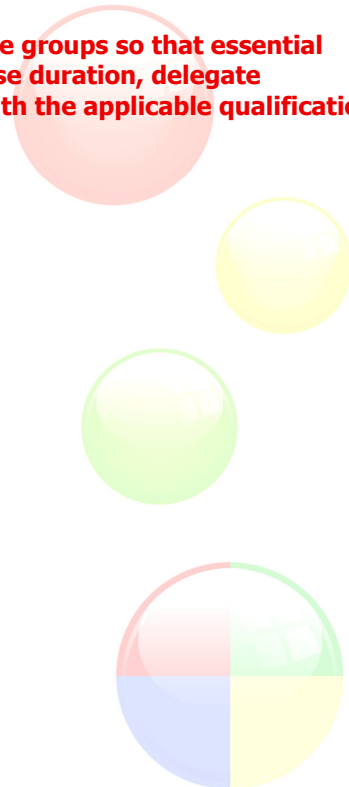
**Training does not have to be restricted to a conventional 9:00 am to 5:00 pm working day. Subject to trainer availability and prior agreement, sessions may be arranged:**

- Before a shift begins
- During an agreed working period
- At the end of a shift
- During evenings
- During nights
- At weekends
- Across split sessions
- Around rotating shift patterns
- At your premises or another agreed location



This flexible approach can reduce disruption to normal operations and avoid requiring an entire department to be removed from the workplace at the same time.

**Where course rules permit, employees may be divided into suitable groups so that essential business operations can continue while training takes place. Course duration, delegate numbers and assessment requirements will continue to comply with the applicable qualification and awarding-body requirements.**





## **Additional Pay-As-You-Go On-Site Shadow Consultancy**

Additional on-site consultancy, training and shadow coaching can be arranged following the Managed Implementation or for work outside the originally agreed implementation scope.

**A PringlePCS consultant will work alongside your employees, providing practical guidance while they use Gekko Wholesale in their normal daily roles.**

### **This service may be used for:**

- Supporting a newly appointed employee
- Training a replacement employee
- Upskilling an existing employee
- Providing departmental refresher training
- Cross-training employees
- Supporting a department following an unexpected absence
- Helping during a particularly busy trading period
- Reviewing whether agreed procedures are being followed
- Carrying out stock-control spot checks
- Introducing a new Gekko Wholesale function
- Helping management investigate an operational problem
- Updating departmental procedures and training guides
- Providing additional coaching after the original rollout

**Sessions can be scheduled around your organisation's operational requirements, subject to consultant availability and prior agreement.**

### **ON-SITE SHADOW COACHING CONSULTANCY RATES**

3-hour session: £145

5-hour session: £275

### **AREAS OF SUPPORT**

Sales | CRM | Order Processing | Purchasing | Picking | Stock Control | Accounts | Credit Control | Reporting | New-Employee Training | Departmental Cover

We understand your operation.

We train and support your people.

We help protect the continuity of your business.





### **SYSTEMS MONITORING & HEALTH**

Updates, proactive monitoring, system-health checks and early identification of developing issues.

### **HARDWARE, SERVER & STORAGE SUPPORT**

Support for servers, storage, networks, virtual environments and essential business infrastructure.

### **CLOUD BACKUP & DISASTER RECOVERY**

Secure backup solutions, recovery planning and practical support following failure, damage or data loss.

### **REMOTE & HYBRID WORKING**

Secure access, home-office support, VPN configuration and reliable working from approved locations.

### **PC, LAPTOP, PRINTER & PERIPHERAL SUPPORT**

Diagnosis, configuration and support for the devices your employees rely on every working day.

### **24/7 TELEPHONE SUPPORT**

Contracted clients can access assistance outside standard office hours in line with their agreed support plan.

### **EMERGENCY ON-SITE SUPPORT**

On-site technical assistance can be arranged for critical incidents when remote resolution is not sufficient.

### **TRAINING IT 365**

Ongoing practical IT, Microsoft 365 and Gekko Wholesale training to develop employee confidence and capability.

### **BUSINESS SKILLS DEVELOPMENT**

Customer care, sales, management, leadership, communication and productivity training for your team.

### **WORKPLACE FIRST AID TRAINING**

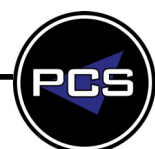
First Aid courses delivered around operational requirements, subject to course and awarding-body rules.

### **IT & RESOURCE MANAGEMENT**

Asset tracking, software licences, equipment planning, supplier coordination and technology lifecycle management.

### **GEKKO WHOLESALE APPLICATION SUPPORT**

Operational support, user guidance, workflow assistance, reporting help and system-development coordination.





### NEXT STEP TO GEKKO WHOLESALE

Let Pringle Pcs Show You What Gekko Can Do For Your Business

### NEXT STEPS

**LET US SHOW YOU WHAT GEKKO CAN DO FOR YOUR BUSINESS**

Gekko provides the technology. We provide the experience, implementation, training and ongoing support required to maximise its value.

Together, Gekko and we can help your business achieve:

**MORE TIME:**  
Streamlined processes, reduced administration and improved efficiency.

**MORE MONEY:**  
Better control of costs, improved productivity and increased profitability.

**MORE CLIENTS:**  
Stronger customer management, improved communication and greater opportunities for growth.

**MORE CONTROL:**  
Clearer information, improved reporting and complete visibility across your business.

**MOST IMPORTANTLY, we provide a trusted business partner with support available 24 hours a day, 7 days a week.**

**WE DO MORE THAN SUPPLY SOFTWARE.**  
We work alongside your business to implement the right solution.

**SUPPORT YOUR TEAM**  
with training, guidance and ongoing assistance.

**ENSURE YOU GAIN THE MAXIMUM**  
benefit from the system, helping your business grow and succeed.

### SEE THE SYSTEM. SEE THE DIFFERENCE.

Discover how Gekko can operate within your business through a free demonstration.

**FREE MICROSOFT TEAMS DEMONSTRATION**  
View the system remotely from any location.

**ON-SITE DEMONSTRATION**  
A member of our team will visit your premises and demonstrate how the system can support your specific business requirements.

**VISIT US**  
Come and see the system in action at our office.

Gekko provides the technology. Pringle PCS provides the experience, implementation, training and ongoing support required to maximise its value.

Together, Gekko and Pringle PCS can help your business achieve:

**More Time:**

Streamlined processes, reduced administration and improved efficiency.

**More Money:**

Better control of costs, improved productivity and increased profitability.

**More Clients:**

Stronger customer management, improved communication and greater opportunities for growth.

**More Control:**

Clearer information, improved reporting and complete visibility across your business.

### DEMO BOOKING

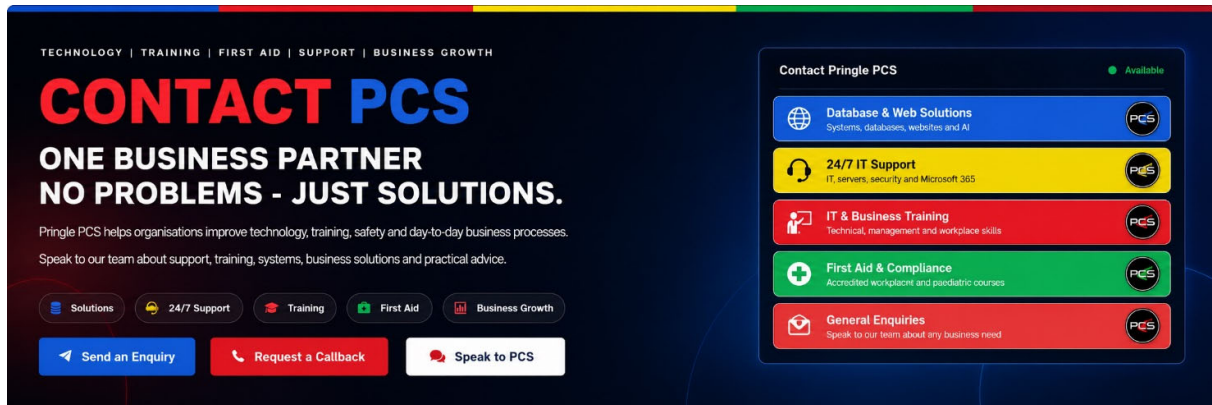
Arrange a live demonstration of Gekko Wholesale and see how the different parts of the system work together. The demonstration provides an opportunity to discuss your existing processes, current problems and the improvements your organisation would like to achieve.

Book your free demonstration today and discover what Gekko and Pringle PCS can deliver for your business

What's covered: A live system walkthrough; relevant Gekko modules; wholesale workflow discussions; questions from your management team; implementation options; training and support requirements; and recommended next steps.



**CONTACT PCS**



TECHNOLOGY | TRAINING | FIRST AID | SUPPORT | BUSINESS GROWTH

# CONTACT PCS

**ONE BUSINESS PARTNER  
NO PROBLEMS - JUST SOLUTIONS.**

Pringle PCS helps organisations improve technology, training, safety and day-to-day business processes.  
Speak to our team about support, training, systems, business solutions and practical advice.

Solutions 24/7 Support Training First Aid Business Growth

[Send an Enquiry](#) [Request a Callback](#) [Speak to PCS](#)

Contact Pringle PCS Available

- Database & Web Solutions**  
Systems, databases, websites and AI
- 24/7 IT Support**  
IT, servers, security and Microsoft 365
- IT & Business Training**  
Technical, management and workplace skills
- First Aid & Compliance**  
Accredited workplace and paediatric courses
- General Enquiries**  
Speak to our team about any business need

Contact PringlePCS to discuss your wholesale operation, request additional information or arrange the next stage of your Gekko Wholesale project.

**SALES ENQUIRIES: 0114 281 3350**  
**EMAIL: SALES@PRINGLEPCS.CO.UK**

**24/7 SUPPORT: 0114 281 3351**  
**EMAIL: SUPPORT@PRINGLEPCS.CO.UK**

**PRINGLEPCS**

[www.pringlepcs.co.uk](http://www.pringlepcs.co.uk)