

SOP: Training Dates & Model Slots

Customer Service > Training Dates & Model Slots · Oct 26, 2026 · @Ivy

Purpose

Use this SOP to run every staff training and every HR model trial from the plan to the follow-up: block the time in Fresha, find the customer models, post and repost to get them, remind them the day before, record how it went, and finish the follow-ups. Each training is **one card**. The card is laid out as the process, top to bottom, and tells you what is still to do. The pictures use made-up sample trainings and models.

1 · Block Block the training in Fresha	2 · Find models Key the models for each time slot	3 · Recruit Post on VIP Telegram and Instagram, repost daily	4 · After Mark conducted, notes, photos	5 · Follow-up Tick the follow-ups
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Who does what

Role	What they do
Manager	Plans the training in the Training Schedule (date, time, trainer, trainees, model time slots). It appears here by itself.
Admin (CS)	Blocks the training and each model slot in Fresha, finds the models, posts and reposts, keys the models, sends the reminder, deletes unfilled slots in Fresha, and records the outcome.
Trainer	Writes the trainer's notes and adds photos after the training.
Area Manager	Receives the open follow-ups on the to-do list once a training is marked conducted.
HR	Asks for a model for a recruit's trial. The request appears here. CS replies with the outcome.

Steps

Step 1 — Open the tab and read it

Go to **Customer Service > Training Dates & Model Slots**. Sessions still to come are first, nearest first. Past sessions are underneath, faded.

The screenshot shows a software interface for managing training sessions. At the top, a pink notification bar (1) states: "1 new Model Trial request from HR — awaiting your action". Below this, the main section is titled "Training Dates & Model Slots" (2). It includes a brief explanation of the workflow and a "+ New Session" button. A row of filter buttons (3) includes "All 3", "Upcoming 2", "Past 1", and "To do:" followed by "Anything to do 3", "Not blocked in Fresha 2", "Models still needed 2", and "Not posted yet 1". A "Repost today 1" button is also present. The first session card (4) is titled "TRG · Lash lift refresher" and is marked as "Scheduled". It shows details like "Staff training", "Cuppage", "Fri 30/10/2026", "10:00-17:00", "Sample Trainer", and "2 trainees". At the bottom of the card, a row of status pills (5) includes "Block in Fresha", "2 models still needed", and "Repost today on VIP Telegram & Instagram". Action buttons for "Edit", "Staff (2)", history, and delete are visible on the right side of the card.

1 The pink bar appears when **HR has asked for a model** for a recruit's trial and nobody has acted yet. 2 **+ New Session** adds a session by hand (Step 7). 3 The filter buttons: **All**, **Upcoming**, **Past**, and under **To do** the jobs waiting, each with a number: **Not blocked in Fresha**, **Models still needed**, **Not posted yet**, **Repost today**, **Delete in Fresha**, **Fresha needs updating** and **Mark conducted**. Press one to see only those cards. 4 The top of each card: **Edit** (change the date, time, trainer, trainees or models), **Staff** (who attends), (history) and **X** (delete). 5 The coloured pills under the title say exactly what still needs doing on this card. ✓ **Nothing to do** means it is complete.

Step 2 — Work down the card

Each card has four boxes, numbered in the order you do them.

TRG - Lash lift refresher Scheduled

Staff training

Cuppage | Fri 30/10/2026 | 10:00-17:00 | Sample Trainer | 2 trainees

Block in Fresha | 2 models still needed | Repost today on VIP Telegram & Instagram

1 BLOCK IT IN FRESHA

Block in Fresha: 30/10/2026 10:00-17:00 · Cuppage
trainer Sample Trainer · trainees: Sample Trainee 1, Sample Trainee 2

☒ Blocked at Fresha · 26/10 · Sample

☐ Updated at Fresha

2 FIND THE MODELS

1/3 models found — 2 still needed

10:30-12:00 1/2 taken

Key models (1/2)

Sample Model A · 9123 4567
prefers morning

☒ Blocked at Fresha · 25/10 · Sample

☐ Updated at Fresha

☐ Reminder sent 1 day before

☐ Deleted in Fresha (no model found)

14:00-15:30 X not taken

Key models (0/1)

☐ Blocked at Fresha

☐ Updated at Fresha

☐ Deleted in Fresha (no model found)

3 RECRUIT MODELS

Post on the VIP Telegram group and Instagram, then repost daily until every slot is taken.

Published by Sample · 25/10

☒ VIP Telegram · 25/10 · Sample

☒ Instagram · 25/10 · Sample

☐ Repost on VIP Telegram

☐ Repost on Instagram

Models still needed — not reposted today on VIP Telegram & Instagram

4 AFTER THE TRAINING

Scheduled

6 Outcome, notes & photos

FOLLOW-UP TO DO 4 OPEN

☐ Open service

☐ Pushed to Area Manager

☐ More models to be requested

☐ Ready to do customers

+ add another follow-up, press Enter

Whatever is still open goes onto the Area Manager's to-do list once the training is marked conducted.

1 1 · Block it in Fresha: block the training's date and time in Fresha, then tick **Blocked at Fresha**. Your name and the date are recorded. If the manager changes the date, time or people afterwards, a red warning says **update Fresha:** change it, then tick **Updated at Fresha**. A training that is cancelled shows **Cancelled — remove the block in Fresha**. **2 2 · Find the models:** one block for each model time slot, with how many are taken. Press **Key models** to enter the models you have confirmed (Step 4). **3 3 · Recruit models:** **Publish for booking**, then tick **VIP Telegram** and **Instagram** when posted (Step 5). **5 5 · Repost:** every day while models are still needed. **6 4 · After the training:** **Outcome, notes & photos** (Step 8). **7 7 · Follow-up to do:** four standing steps plus any you add (Step 9).

Step 3 — Block the training and each model slot in Fresha

1. Open the card. In box 1, block the training's date and time in Fresha, for the trainer and the trainees listed.
2. Tick **Blocked at Fresha**. The card now shows who blocked it and when.
3. For each model time slot in box 2, block that slot in Fresha so a customer model can book it, then tick **Blocked at Fresha** under that slot.
4. If the manager changes the plan later, the card warns you in red: update Fresha, then tick **Updated at Fresha**.

Step 4 — Key the models you find

When a model confirms a time slot, press 🧑 **Key models (found/needed)** under that slot.

Models · Model · Lash lift refresher

1 uppage · 30/10/2026 10:30-12:00 · 2 models needed
Fill in each model you have confirmed for THIS time slot — leave the rest blank until found.

1 2 Sample Model A 3 9123 4567 4 prefers morning

2 Model name Phone Notes

Cancel 5 Save

1 The box says the outlet, the date, the time and how many models that slot needs. Fill in each model you have **confirmed** for this time slot, and leave the rest blank. 2 **Model name**. 3 **Phone**. 4 **Notes** (for example “prefers morning”). 5 **Save**. The count updates (for example 1/2). When every slot is filled the card shows ✓ **All models found**.

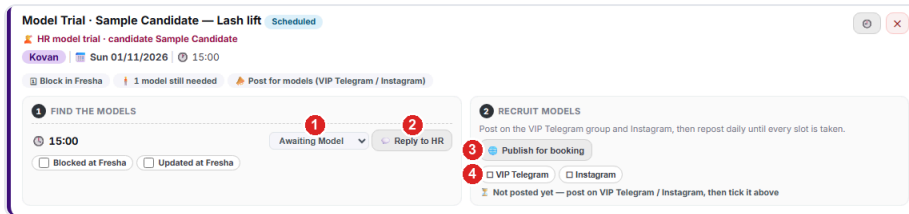
Once the model is in Fresha, tick **Updated at Fresha**. The day before the slot, send the model a reminder and tick **Reminder sent 1 day before**. From the day before, the card shows ⏰ **Send the 1-day-before reminder to the model** until you do. If a slot is still empty when it is too late, delete the slot in Fresha and tick **Deleted in Fresha (no model found)**. If a model turns up after you deleted it, a red warning tells you to block it again.

Step 5 — Recruit: post and repost for models

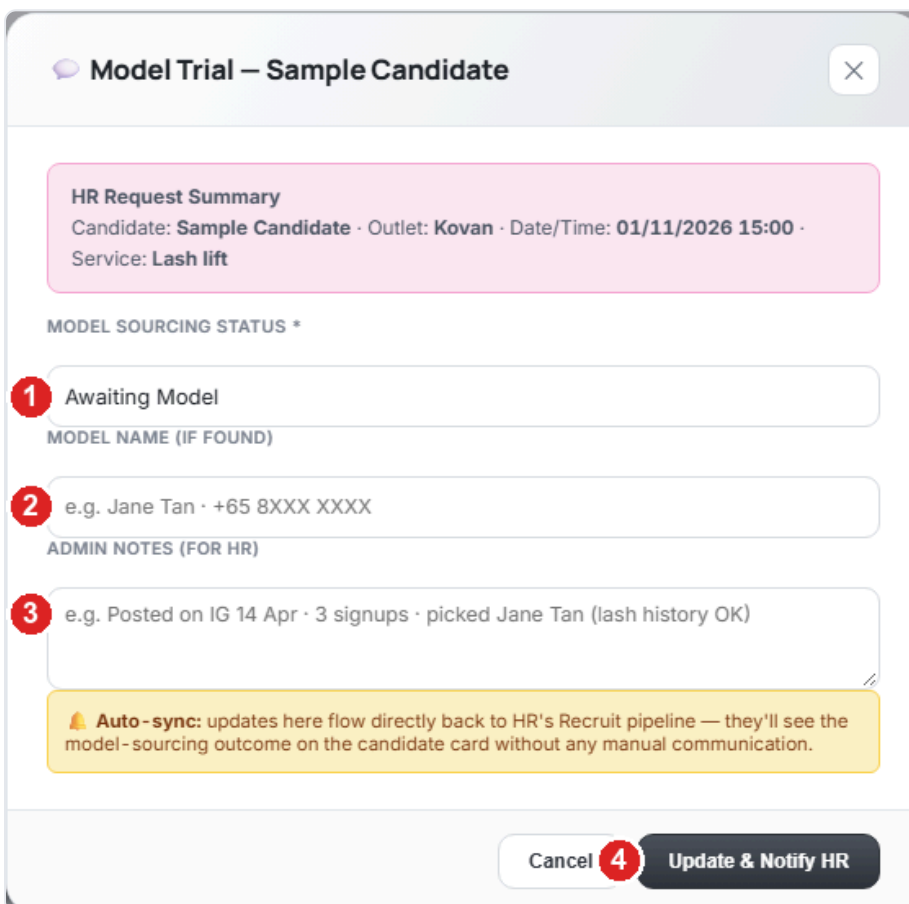
- Press 🌐 **Publish for booking** so the slot can be booked.
- Post the request on the **VIP Telegram** group and on **Instagram**, then tick each one. The tick records who posted and when.
- While models are still needed, **repost every day**. Press 📋 **Repost on VIP Telegram** and 📋 **Repost on Instagram** after you repost. The dates and names are listed under it (press ↶ to remove the latest by mistake).
- A red line ⚠ **Models still needed — not reposted today** means a channel has not been reposted today. A card that has not been posted yet shows ⏰ **Not posted yet**.

Step 6 — A model trial asked for by HR

When HR schedules a model trial for a recruit, the card **appears here by itself** and the pink bar shows at the top. CS finds the model and tells HR.



1 Set the **model status** straight on the card: **Awaiting Model**, **Model Found**, **No Model Found** or **Cancelled**. If you choose Model Found, it asks for the model's name and contact. **2** **Reply to HR** opens the full reply box. **3** **Publish for booking** and **4** the **VIP Telegram / Instagram** ticks work the same way as for a training. Block the slot in Fresha too.



1 **Model Sourcing Status**. **2** **Model Name** (if found), with the contact. **3** **Admin Notes (for HR)**, for example where you posted and who signed up. **4** **Update & Notify HR**. The answer goes straight back to the candidate's card in HR's Recruit pipeline, so nobody has to message HR.

Step 7 — Add a session by hand: + New Session

Trainings planned by the manager and HR model trials come here by themselves. Use + **New Session** only for a session that is not planned anywhere else.

Training / Model Slot

1

SESSION TITLE *

2

Model Slot

3

Cuppage

4

DD/MM/YYYY

5

14:00

10

0

6

— select employee —

7

TAFF ATTENDING — SHOWN IN THE ROSTER AS TRG (STAFF TRAINING / TRG / MASTERCLASS / PRODUCT DEMO)
[All](#) [None](#) [Staff of the chosen outlet](#)

☐ SAMPLE TRAINEE 1 · CUPPAGE

☐ SAMPLE TRAINEE 2 · CUPPAGE

DESCRIPTION

STATUS

Open

Cancel

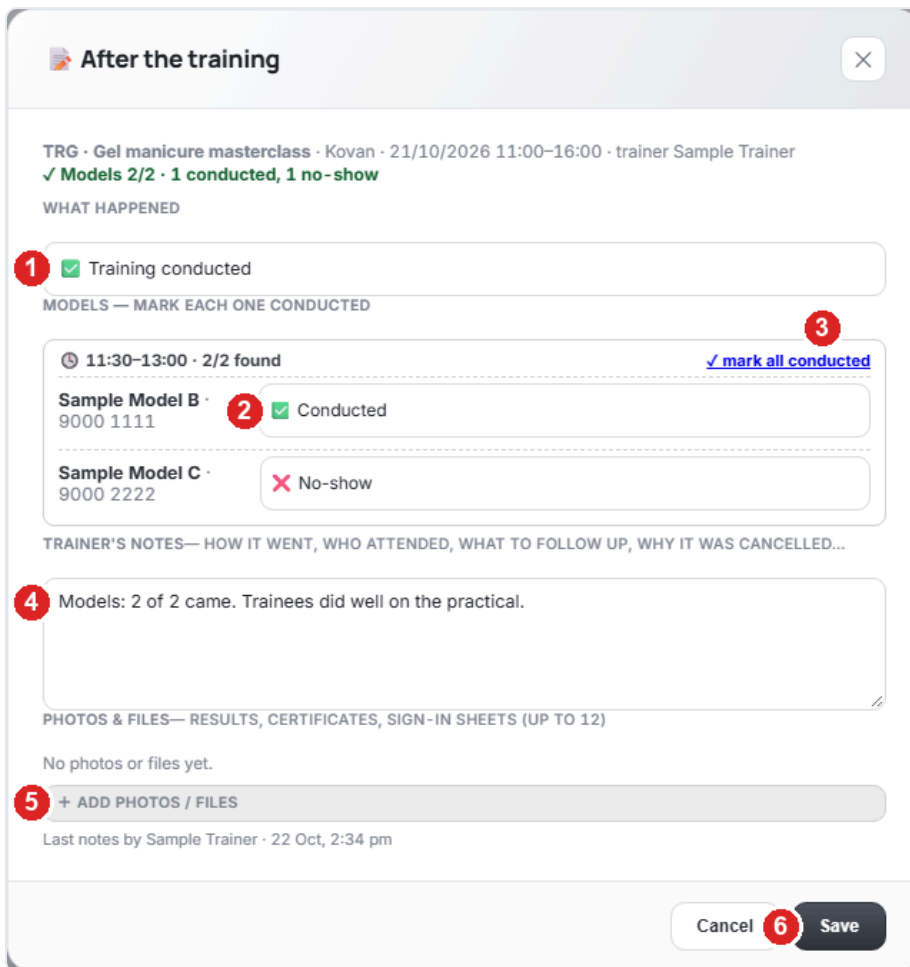
8

Save

1 Session Title (required). **2 Type:** Model Slot, Staff Training, TRG, Masterclass, Product Demo or Open Day. **3 Outlet.** **4 Date** (required). **5 Time, Total slots** and **Filled.** **6 Trainer.** **7 Staff attending:** shown in the Roster as TRG for staff trainings. **8 Save.**

Step 8 — After the training: outcome, notes and photos

After the training, press  **Outcome, notes & photos** on the card.



1 What happened: **Scheduled (not yet done)**,  **Training conducted** or  **Cancelled**. A past training with no outcome shows  **Outcome not marked** and a to-do pill. **2** Mark each model  **Conducted** or  **No-show**. **3**  **mark all conducted** does a whole time slot at once. **4** **Trainer's notes**: how it went, who attended, what to follow up, or why it was cancelled. **5** **+ Add photos / files**: results, certificates or sign-in sheets, up to 12. **6** **Save**.

A **cancelled** training also cancels its model slots. Remove the blocks in Fresha, as the card says.

Step 9 — Follow-up to do

Under **After the training** there is a checklist: **Open service**, **Pushed to Area Manager**, **More models to be requested** and **Ready to do customers**. Tick each one when it is done. Your name and the date are recorded. Type your own extra item in the box and press Enter.

Once the training is marked **conducted**, whatever is still open is put on the **Area Manager's to-do list** as one task for that training, kept up to date as you tick, and cleared when everything is done. The pill  **Follow-ups open** shows on the card until then.

Step 10 — History, staff and fixes

-  lists every update on the card: who did it, when, and what. Use it to settle "who ticked that?".
-  **Staff** sets who attends a staff training. They show in the Roster as **TRG**, in the outlet's colour.
-  **Edit** changes the date, time, trainer, trainees or model slots. Blocks in Fresha will then say **update Fresha**.
- **Untick** a tick that was pressed by mistake. Use **X** only for a card that should never have existed.

Checks and tips

Use the To do buttons. Press **Not blocked in Fresha** and **Repost today** first thing each day. Those two are the jobs most easily missed.

Tick when it is true. A tick records your name. Tick only after you have really done it in Fresha or on the channel.

Remind the day before. A model who is not reminded is the most likely no-show. Tick **Reminder sent 1 day before** as soon as you send it.

Do not leave an empty slot blocked. If no model is found, delete the slot in Fresha so the room is not held for nothing, and tick Deleted in Fresha.

Mark the outcome the same week. An unmarked past training shows **Outcome not marked** and its follow-ups never reach the Area Manager.