**Sales New Starter Checklist**

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| **Employee Details** | | | |
| **Name:** |  | | |
| **Role:** |  | **Start date:** |  |
| **Group Leader / Trainer** |  | **Territory:** |  |

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| --- | --- | --- | --- | --- |
| **Welcome, HR and Administrative** | | | Comments | Tick |
| □ HR Induction / Health & Safety Induction  □ Contracts filled and uploaded to NS / all documents read and signed  □ Introduction to Handbook, Policies, Sales Manual and Office Manual  □ Meet colleagues / tour of office  □ Meet Deputy Sales Director, Sales Director and Managing Director | | |  |  |
| **Introduction to phone** | | | Comments | Tick |
| □ Practice making, receiving, transferring demo calls  □ Introduction to wiki | | |  |  |
| **Introduction to Zimbra / Price List** | | | Comments | Tick |
| First insight from Group Leader/ Trainer assigned:  □ Password change of Zimbra and Windows  □ Login, compose email, spell check, creating folders, email signature,  sharing folders, filters, tags, out of office message  □ Set up A – Z email folder organization and follow up organization  □ Set up tabs (Price List, NS, TNT, Flashbay homepage etc).  □ Explain Price List  □ Provide your territory’s ‘Reference for quotes’ sheet | | |  | Yes/ No |
| **Introduction to website & Sample pack** | | | Comments | Tick |
| □ Product familiarization (website, Sample pack and accessories)  □ Read website and wiki Product Knowledge  □ Tour of Online Customer Centre  (U: [tester@flashbay.com](mailto:tester@flashbay.com) P: tester)  □ Sister website (where applicable) | | |  |  |
| **Stage by stage analysis of the Sales Cycle (M3)** | | | Comments | Tick |
| 1. Receiving a lead (show lead examples)  2. Analysing and qualifying the lead (5 mins step 1-4)  3. Response (10 mins)  3.1. Phone  3.2 Email (with use of Quote tool)  4. Virtual Proof  5. Dummy Sample Pack  6. Negotiation  7. Order  8. Trustpilot Feedback (show process)  9. Customer follow up  10. Automatic follow up | | |  |  |
| **Introduction to CRM Software – NetSuite (M2)** | | | Comments | Tick |
| □ Understand relationship between record types: lead/ customer.  contact, sales order, invoice, virtual proof  □ How to see own customer/ lead list  □ List views, list editing, sorting by column headers, sort using filters  □ Creating customer, contact, sales order  □ Duplicate checking  □ Procedure to send samples, sample allowance  □ Understand how adding contact records enables user to login to  Customer Centre | | |  |  |
| **Virtual Proofs, branding methods & image format** | | | Comments | Tick |
| □ What is VP and how to request  □ Guide to image formats and resolution (how to check, what is vector  file)  □ Understanding branding methods: screen printing,  laser engraving  digital/ photo printing  embossing | | |  |  |
| **Case study (Group Leaders)** | | | Comments | Tick |
| □ Replying to an example web lead with official quote and virtual proof  □ Understanding of lead times  □ Use of Auto text (pros and cons)  □ Pricing strategies - price levels, reseller vs final customer  □ When to give special offer, what can be offered (during trial period with  and without approval of the Group Leader)  □ Trainer to pretend to be the customer | | |  |  |
| **Payment terms, credit application, payment chasing** | | | Comments | Tick |
| □ Show step by step the process  □ Credit requests (<10,000 GBP / Credit Auto Assessment)  □ Credit requests (>10,000 GBP / text parts)  □ Payment chasing for overdues and for overdue customers reassigned  to new SAM | | |  |  |
| **Introduction to Flashbay sales concepts (Group Leader)** | | | Comments | Tick |
| □ MDAR – As soon stable and achieved, eligible for new web leads  □ 15 minutes web lead policy  □ Every call followed by email (memo email)  □ Understand automatic follow up  □ Understand follow up stages and frequency  □ No voicemail policy  □ Keeping contacts up to date in NS | | |  |  |
| **Order generation from old web leads ( Group Leader)** | | | Comments | Tick |
| □ Review lead history in NetSuite (price, VP, sample, status)    □ Gain experience of calling customers (web leads to be called  individually)  □ Gain experience of email writing (all calls to be accompanied by email,  next step) | | |  |  |
| **Session with Trainer** | | | | |
| □ Feedback and suggestions  □ Review of activity  □ Skills improvement  □ Long term goals | | | | |
| **Comments** | | | | |
|  | | | | |
| **Training Record** |  |  | | |
| **Zimbra** |  |  | | |
| **Netsuite** |  |  | | |
| **Sales cycle** |  |  | | |
| **Email** |  |  | | |
| **Phone call** |  |  | | |
| **Aftersales** |  |  | | |
| **Negotiation** |  |  | | |
| **Graphics** |  |  | | |
|  |  |  | | |
| **Key issued** |  | **Passwords changed (Zimbra, Windows) Yes / No** | | |
| **Signed (Sales Account Manager) :**  **Signed (Trainer):**  **Signed (Group Leader):**  **Signed (Team Leader):**  **Signed (Manager/ Deputy Sales Director/ Sales Director):**  Date: | | | | |