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| Employee Details |
| Name: |  |
| Role: |  | Start date: |  |
| Group Leader: |  | Territory: |  |

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| Welcome, HR & 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 Managing Director |  |  |
| Introduction to phone | Comments | Tick |
| To be covered by group leader/trainer assigned on the first day:□ Practice making, receiving, transferring demo calls |  |  |
| Introduction to Zimbra / price list | Comments | Tick |
| First insight from group leader/trainer assigned:□ Login, compose email, spell check, creating folders, email signature, sharing folders, filters, tags, out of office message□ Setup A-Z email folder organization and follow-up organization□ Setup tabs (price-list, NetSuite, TNT, Flashbay-Homepage…)□ Explain price listFurther detail to be provided in the SalesHero Academy |  |  |
| Introduction to website & sample pack | Comments | Tick |
| □ Product familiarization (alongside real sample pack and accessories)□ Learn FAQs and read wiki□ Tour of Online Customer Centre(U: tester@flashbay.com, P: tester) |  |  |
| Stage by stage analysis of the Sales Cycle (SalesHero Academy Module 3) | Comments | Tick |
| 1. Receiving a lead (show lead examples)2. Analyzing and qualifying the lead (5min. steps 1-4)3. Response (10min.)3.1 Phone3.2 Email4. Virtual proof5. Dummy sample pack6. Negotiation7. Order8. Trustpilot Feedback (show process)9. Customer follow up |  |  |

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| Introduction to CRM Software – NetSuite (SalesHero Academy Module 2) | Comments | Tick |
| □ Understand relationship between record types: customer/lead, contact, sales order, invoice and virtual proof□ How to see own customer/lead list□ List views, list editing, sorting by column header, sort using filters□ Creating customer, contact, sales order□ Duplicate checking (font size)□ Procedure to send samples, sample allowance□ Understand how adding contact records enables user to login toCustomer Centre |  |  |
| Virtual proofs, branding methods & image formats (Group Leaders) | Comments | Tick |
| □ What is virtual proof and how to request? – text parts□ Guide to image formats. What is resolution? How tocheck resolution? What is Vector file?□ Understanding of branding methods: screen printing, engraving, photo printing, embossing |  |  |
| Case study (Group Leaders) | Comments | Tick |
| □ Replying to an example web lead with quote and virtual proof:□ Understanding of lead times□ Use of auto text (pros and cons)□ Pricing strategies - price levels, reseller vs. final customer□ Trainer to pretend to be the customer |  |  |
| Payment terms, credit application, payment chasing (Group Leaders) | Comments | Tick |
| □ Shown step by step the process□ Credit requests (<10,000GBP/Credit Auto Assessment) and(>10,000GBP/UK) – text parts |  |  |
| Introduction to Flashbay sales concepts (Group Leaders) | Comments | Tick |
| □ MDAR – As soon stable and achieved, eligible for new web leads□ 15 minutes web lead policy□ Every call followed by email policy (email memo)□ Understand follow-up stages and frequency |  |  |

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| Real work: Order generation from old web leads (Group Leader Supervision) | Comments | Tick |
| □ Review lead history in NetSuite (e.g. price, virtual proof, 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) |  |  |
| Session with Trainer | Tick |
| □ Feedback and suggestions□ Review of activity□ Skills improvement□ Long term goals |  |
| Comments |
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| Training Record |
| Zimbra Training |  | Graphics Training |  |
| Netsuite Training |  |  |  |
| Sales cycle Training |  |  |  |
| Email Training |  |  |  |
| Phone call Training |  |  |  |
| Aftersales training |  | Key issued |  |
| Negotiation Training |  |  |  |
| Signatures |
| Signed (Sales Account Manager): Date: Signed (Trainer): Date: Signed (Group Leader) Date: Signed (Team Leader) Date: Signed (Manager / Sales Director) Date: |
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