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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 list  Further 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](mailto: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 Phone  3.2 Email  4. Virtual proof  5. Dummy sample pack  6. Negotiation  7. Order  8. 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 to  Customer 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 to  check 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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