Sales New Starter Checklist

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

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: • Show how to use buttons for company extensions directory • Practise 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 organisation and follow-up organisation • 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 familiarisation (alongside real sample pack and accessories) • Learn FAQs • Tour of Online Customer Centre (U: tester@flashbay.com, P: tester)		
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Stage by stage analysis of the Sales Cycle (SalesHero Academy Module 1)	Comments	Tick
1. Receiving a lead (show lead examples) 2. Analysing 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		
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		
Introduction to back-end processes (Group Leaders)	**Comments**	**Tick**
• Explain how the factory works, the shipment and order status emails		
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		

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Introduction to Flashbay sales concepts (Group Leaders)	Comments	Tick
• MDAR – As soon stable and achieved, eligible for new leads • 15 minute web lead policy • Every call followed by email policy (memo email) • Understand follow-up stages and frequency		
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) • Devise organisational procedure for campaign • Gain experience of calling customers (web leads to be called individually) • Gain experience of email wiring (all calls to be accompanied by email)		

Session with Trainer	Tick
• Feedback and suggestions • Review of activity • Skills improvement • Long term goals	

Comments

Training Record			
Graphics Training		Sales cycle training	
Email & call check		Misleading	
Sales cycle video training and test		Key issued	

Signatures

Signed (Sales Account Manager): Date:

Signed (Trainer/Group Leader): Date:

Signed (Manager): Date: