Sales New Starter Checklist

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

1. Welcome, HR and Administrative (HR)	**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 Sales Director and CEO		

2. Facilities check	**Comments**	**Tick**
Picture Briefcase share accepted		
Slack		
Zimbra password changed		
Netsuite password changed		
Windows password change		

3. Introduction to phone	**Comments**	**Tick**
Practice making, receiving, transferring demo calls		
Introduction to wiki		

4. 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 Set up A – Z email folder organization and follow up organization		
Explain Price Lists		
Provide the country specific 'Reference for quotes' sheet and 'Territory specific' sheet Introduction to Livechat (if applicable)		

flashbay®

5. Introduction to CRM Software – NetSuite	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		
When to put a lead/customer inactive		
When to Ban a lead/customer		
When to untick Marketing subscribed		

6. Introduction to website & Sample pack	Comments	Tick
Product familiarization (website, Product categories, Sample packs and accessories)		
Read website, website FAQ and wiki Product Knowledge		
Tour of Online Customer Centre (U: tester@flashbay.com P: tester)		
Sister website (where applicable)		

7. 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: SPR, ENL, DPR, EMB		

8. Stage by stage analysis of the Sales Cycle	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. Scheduling Next date of follow up in Pipeline		
5. Virtual Proof		
6. Dummy Sample Pack		
7. Negotiation		
8. Order		
9. Trustpilot Feedback (show process)		
10. Customer follow up		
11. How to prioritize emails in your inbox		

9. Case study	Comments	Tick
Replying to an example web lead with official quote and Virtual proof		
Understanding of lead times for all Product categories		
Understanding order quantity limitations (Power banks, Gift sets)		
Use of text parts, templates (pros and cons)		
Pricing strategies - price levels, reseller vs final customer, USB Flash Drives vs Power banks		
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		

10. Payment terms, credit application, payment chasing	Comments	Tick
Show step by step the process (information to provide in email)		
Credit requests (<5,000 GBP / Credit Auto Assessment, Group Leader)		
Credit requests (>5,000 GBP <10,000 GBP / text parts, Group Leader, Accounts)		
Credit requests (>10,000 GBP/ text parts, Accounts)		
Payment chasing for overdues and for overdue customers reassigned to new SAM		

11. Introduction to Flashbay sales concepts	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 Pipeline feature (Next date of contact)		
Understand follow up stages and frequency		
No voicemail policy		
Keeping contacts up to date in NS		

12. Order generation from old web leads	Comments	Tick
Review lead history in NetSuite (price, VP, sample, status)		
Gain experience of calling old leads		
Gain experience of email writing (all calls to be accompanied by email, next step, attachments)		

flashbay®

Training Record		
1. Zimbra		
2. NetSuite		
3. Sales cycle		
4. Email		
5. Phone call		
6. Negotiation		
7. Graphics		
8. IT Data preload		
9. Power banks		
10. Audio products		
11. Aftersales		
Key issued		**Password changed (Zimbra, NS, Windows) Yes/No**

Session with Trainer	Comments	Tick
Feedback and suggestions		
Review of activity of the first 2 weeks		
Skill improvement		
Long term goals		

COMMENTS

flashbay®

COMMENTS

	Signature	Date
Signed (Sales Account Manager)		
Signed (Trainer):		
Signed (Group Leader):		
Signed (Team Leader):		
Signed (Sales Director):		