

New starter checklist

To be conducted within the first 2 weeks

Welcome and Administrative formalities

- Contracts filled and uploaded to NS / All documents read and signed
- Introduction to Sales Manual and Office Manual (on Zimbra)
- Shown Welcome pack and Brochure
- Meet Colleagues/ Tour of Office
- Meet Directors James Roberts & Phillip Schlosstein

Introduction to phone

- Show how to use buttons for company extensions directory
- Practise making, receiving, transferring demo calls

Introduction to Zimbra/Price list

- Login, Email compose, 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 Mozilla Tabs (Price-list, Netsuite, TNT, Flashbay-Homepage...)
- Explain price list

Introduction to Website & Sample Pack

- Product familiarisation (alongside real sample pack and accessories)
- Learn FAQs
- Tour of Online Customer Centre (tester@flashbay.com, password: tester)

Stage by stage analysis of the Sales Cycle

- Receiving and Analysing a Lead (show Lead examples)
- Analysing and Qualifying the Lead (5min. Steps 1-4)
- Response (10min.)
 - Phone
 - Email
- Virtual Proof
- Dummy Sample Pack
- Follow Up
- Negotiation
- Order
- Trustpilot Feedback (show process)
- Customer Follow Up

Introduction to CRM Software – NetSuite

- 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
- Procedure to send samples, sample allowance
- Understand how adding contact records enables user to login to Customer Centre

Introduction to Back End processes

- What happens at the Factory, the Shipment and Order Status email

Virtual Proofs, Branding Methods and Image Formats

- What is virtual Proof and how to request? – Text Parts
- Guide to Image formats. What is Resolution? How to check the resolution? What is a Vector file?
- Understanding of branding methods: screen printing, engraving, photo printing, embossing

Case Study: 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

- Shown step by step the process
- Credit requests (<10,000GBP/Team Leader) and (>10,000GBP/UK) – Text Parts
- Credit Tool

Introduction to Flashbay Sales Concepts

- 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

- 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)

Meeting with trainer - feedback and suggestions

Review of activity, Skills to improve, Trainees long term goals in Flashbay

Comments:

Training Record:

- Graphics Training
- Email Check and Call Check
- Sales Cycle Video Training & Tests
- Sales Cycle Training
- 2 weeks trial period passed
- Keys Issued

Signed (Sales Account Manager):

Date

Signed (Trainer/ Group Leader):

Date

Signed (Manager):

Date