

Sales New Starter Checklist

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

Welcome, HR and Administrative	Comments	Tick
<input type="checkbox"/> HR Induction / Health & Safety Induction <input type="checkbox"/> Contracts filled and uploaded to NS / all documents read and signed <input type="checkbox"/> Introduction to Handbook, Policies, Sales Manual and Office Manual <input type="checkbox"/> Meet colleagues / tour of office <input type="checkbox"/> Meet Deputy Sales Director, Sales Director and Managing Director		
Introduction to phone	Comments	Tick
<input type="checkbox"/> Practice making, receiving, transferring demo calls <input type="checkbox"/> Introduction to wiki		
Introduction to Zimbra / Price List	Comments	Tick
First insight from Group Leader/ Trainer assigned: <input type="checkbox"/> Password change of Zimbra and Windows <input type="checkbox"/> Login, compose email, spell check, creating folders, email signature, sharing folders, filters, tags, out of office message <input type="checkbox"/> Set up A – Z email folder organization and follow up organization <input type="checkbox"/> Set up tabs (Price List, NS, TNT, Flashbay homepage etc). <input type="checkbox"/> Explain Price List <input type="checkbox"/> Provide your territory's 'Reference for quotes' sheet		Yes/ No
Introduction to website & Sample pack	Comments	Tick
<input type="checkbox"/> Product familiarization (website, Sample pack and accessories) <input type="checkbox"/> Read website and wiki Product Knowledge <input type="checkbox"/> Tour of Online Customer Centre (U: tester@flashbay.com P: tester) <input type="checkbox"/> Sister website (where applicable)		

Stage by stage analysis of the Sales Cycle (M3)	Comments	Tick
<ol style="list-style-type: none"> 1. Receiving a lead (show lead examples) 2. Analysing and qualifying the lead (5 mins step 1-4) 3. Response (10 mins) <ol style="list-style-type: none"> 3.1. Phone 3.2 Email (with use of Quote tool) 4. Virtual Proof 5. Dummy Sample Pack 6. Negotiation 7. Order 8. Trustpilot Feedback (show process) 9. Customer follow up 10. Automatic follow up 		
Introduction to CRM Software – NetSuite (M2)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Understand relationship between record types: lead/ customer. contact, sales order, invoice, virtual proof <input type="checkbox"/> How to see own customer/ lead list <input type="checkbox"/> List views, list editing, sorting by column headers, sort using filters <input type="checkbox"/> Creating customer, contact, sales order <input type="checkbox"/> Duplicate checking <input type="checkbox"/> Procedure to send samples, sample allowance <input type="checkbox"/> Understand how adding contact records enables user to login to Customer Centre <input type="checkbox"/> When to put a lead/customer inactive 		
Virtual Proofs, branding methods & image format	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> What is VP and how to request <input type="checkbox"/> Guide to image formats and resolution (how to check, what is vector file) <input type="checkbox"/> Understanding branding methods: screen printing, laser engraving, digital/ photo printing, embossing 		
Case study (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Replying to an example web lead with official quote and virtual proof <input type="checkbox"/> Understanding of lead times <input type="checkbox"/> Use of Auto text (pros and cons) <input type="checkbox"/> Pricing strategies - price levels, reseller vs final customer <input type="checkbox"/> When to give special offer, what can be offered (during trial period with and without approval of the Group Leader) <input type="checkbox"/> Trainer to pretend to be the customer 		

Payment terms, credit application, payment chasing	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Show step by step the process <input type="checkbox"/> Credit requests (<10,000 GBP / Credit Auto Assessment) <input type="checkbox"/> Credit requests (>10,000 GBP / text parts) <input type="checkbox"/> Payment chasing for overdues and for overdue customers reassigned to new SAM 		
Introduction to Flashbay sales concepts	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> MDAR – As soon stable and achieved, eligible for new web leads <input type="checkbox"/> 15 minutes web lead policy <input type="checkbox"/> Every call followed by email (memo email) <input type="checkbox"/> Understand automatic follow up <input type="checkbox"/> Understand follow up stages and frequency <input type="checkbox"/> No voicemail policy <input type="checkbox"/> Keeping contacts up to date in NS 		
Order generation from old web leads (Group Leader)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Review lead history in NetSuite (price, VP, sample, status) <input type="checkbox"/> Gain experience of calling customers (web leads to be called individually) <input type="checkbox"/> Gain experience of email writing (all calls to be accompanied by email, next step) 		
Session with Trainer		
<ul style="list-style-type: none"> <input type="checkbox"/> Feedback and suggestions <input type="checkbox"/> Review of activity <input type="checkbox"/> Skills improvement <input type="checkbox"/> Long term goals 		

Comments

Training Record		
Zimbra		
Netsuite		
Sales cycle		
Email		
Phone call		
Aftersales		
Negotiation		
Graphics		
Key issued		Passwords changed (Zimbra, Windows) Yes / No

Signed (Sales Account Manager) :

Signed (Trainer):

Signed (Group Leader):

Signed (Team Leader):

Signed (Manager/ Deputy Sales Director/ Sales Director):

Date:

