**Sales New Starter Checklist**

**Name:**

**Team:**

**Start date:**

**Trainer:**

1. **HR induction\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Contract read and signed
* Introduction to Handbook, Policies, Sales Manual and Office Manual
* Meet colleagues/tour of the offices
* Meet the Global CEO (London only)

1. **Password change\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Zimbra (E-mail)
* NetSuite (CRM)
* Windows (Computer)

1. **Initial introduction to Zimbra (E-mail)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* A-Z folders created for customers and leads
* Spell check installed
* How to compose a new email
* All 3 tabs in the Pipeline is explained
* Share for the Picture briefcase accepted
* Where to locate sales templates
* Where to locate templates for Virtual Proof, Aftersales and credit requests
* Introduction to the different tabs in Zimbra (e.g. Employee portal)
* How to generate a quote

1. **Initial understanding of NetSuite (CRM system)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Understand the difference between a lead and a customer
* How to create a new lead
* How to check for duplicates
* How to generate a pricelist
* How to place a sales order
* How to request dummy samples for customer
* How to keep contact records up to date

1. **Initial introduction to Slack\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Create a profile
  + Job title
  + Country
  + Profile/portrait picture of yourself (recommended)
* Add to all the relevant channels
  + Sales\_Global
  + General
  + Price\_Match
  + Competitor
  + Infringement
  + Team Channel
  + Office Channel (i.e London)
  + IT\_help
* Explain why and how to @ mention members
* Explain how to start a thread
* Explain what Slack is and what it's used for

1. **Introduction to Flashbay Website\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Good understanding of our website (FAQ, product knowledge)
* Tour of our online customer centre (U: [tester@flashbay.com](mailto:tester@flashbay.com), P: tester)
* Review our sister websites

1. **Introduction to Flashbay Wiki\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Good understanding of what Wiki can be used for
* Been shown how to look for updates on a weekly basis

1. **Phone training (not applicable for PH)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_**

* How to answer the phone (e.g. Welcome to Flashbay you are speaking with XXX)
* How to transfer a call
* General phone guidelines such as no voice mail and never put a customer on hold (unless to transfer a call)
* How to make outbound calls, i.e. Country code and how to introduce one self

1. **Email communication\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* What template to use
* What subject line to use
* What attachments to include in the email
* Follow up structure

1. **Understand the importance of the ‘Flashbay Global Sales Standard for New Leads’\_\_\_\_**

* All leads to receive a phone call as first point of contact, if missed send email
* Correct template and attachments to initial email
* Timely follow-ups
* Fight for every lead
* Email memo following every call/call attempt

1. **Flashbay online training (MT). \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Completed MT
* Passed FSE

1. **General understanding of Flashbay\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* MDAR – Minimum Daily Activity Record (75 unique activities)
* MPE – Minimum Profit Expectations
* CMPE – Cumulative Minimum Profit Expectations
* NB – New Business
* GP – Gross Profit

1. **Know who to contact internally\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

* Issues with delivery of dummy samples (UPS) - [warehouse@flashbay.com](mailto:warehouse@flashbay.com)
* Issues with delivery of customer order (TNT/FedEX) - [shiptrack@flashbay.com](mailto:shiptrack@flashbay.com)
* Unhappy customer – Group Leader and Aftersales
* Unable to attend work (sick) – [attendance@flashbay.com](mailto:attendance@flashbay.com) and Group Leader
* Who to contact for IT issues – IT\_help Slack channel

**Comments**

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**Sales Account Manager**

**Date:**

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**Team/Group Leader**

**Date:**