**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, 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
* Issues with delivery of customer order (TNT/FedEX) - shiptrack@flashbay.com
* Unhappy customer – Group Leader and Aftersales
* Unable to attend work (sick) – 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:**