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|  **Employee Details** |

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| **Name:** |  |
| **Role:** |  | **Start date:** |  |
| **Group Leader:**  |  | **Territory:** |  |

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|  **Welcome, HR & Administrative**  |  **Comments** |  **Tick** |

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| * 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 Managing Director

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|  **Introduction to phone**  |  **Comments** |  **Tick** |

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| To be covered by group leader/trainer assigned on the first day: * Show how to use buttons for company extensions directory
* Practise making, receiving, transferring demo calls

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|  **Introduction to Zimbra / price list**  |  **Comments** |  **Tick** |

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| First insight from group leader/trainer assigned:* Login, compose email, 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 tabs (price-list, NetSuite, TNT, Flashbay-Homepage…)
* Explain price list

Further detail to be provided in the SalesHero Academy  |  |  |

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|  **Introduction to website & sample pack**  |  **Comments** |  **Tick** |

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| * Product familiarisation (alongside real sample pack and accessories)
* Learn FAQsand read wiki
* Tour of Online Customer Centre (U: tester@flashbay.com, P: tester)

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|  **Stage by stage analysis of the Sales Cycle** (SalesHero Academy Module 3) |  **Comments** |  **Tick** |

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| 1. Receiving a lead (show lead examples)2. Analysing and qualifying the lead (5min. steps 1-4)3. Response (10min.)3.1 Phone 3.2 Email 4. Virtual proof5. Dummy sample pack6. Negotiation 7. Order8. Trustpilot Feedback (show process)9. Customer follow up |  |  |

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|  **Introduction to CRM Software – NetSuite** (SalesHero Academy Module 2) |  **Comments** |  **Tick** |

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| * 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 (font size)
* Procedure to send samples, sample allowance
* Understand how adding contact records enables user to login to Customer Centre

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|  **Virtual proofs, branding methods & image formats** (Group Leaders) |  **Comments** |  **Tick** |

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| * What is virtual proof and how to request? – text parts
* Guide to image formats. What is resolution? How to check resolution? What is Vector file?
* Understanding of branding methods: screen printing, engraving, photo printing, embossing

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|  **Case study** (Group Leaders) |  **Comments** |  **Tick** |

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| 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

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|  **Payment terms, credit application, payment chasing** (Group Leaders) |  **Comments** |  **Tick** |

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| * Shown step by step the process
* Credit requests (<10,000GBP/Credit Auto Assessment) and (>10,000GBP/UK) – text parts

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|  **Introduction to Flashbay sales concepts** (Group Leaders) |  **Comments** |  **Tick** |

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| * MDAR – As soon stable and achieved, eligible for new web leads
* 15 minutes web lead policy
* Every call followed by email policy (memo email)
* Understand follow-up stages and frequency

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|  **Real work: Order generation from old web leads** (Group Leader Supervision) |  **Comments** |  **Tick** |

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| * Review lead history in NetSuite (e.g. price, virtual proof, sample, status)
* Gain experience of calling customers (web leads to be called individually)
* Gain experience of email writing (all calls to be accompanied by email)

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|  **Session with Trainer**  |  **Tick** |

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| * Feedback and suggestions
* Review of activity
* Skills improvement
* Long term goals
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|  **Comments**  |  |

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|  **Training Record** |

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| Zimbra Training |  | Graphics Training |  |
| Netsuite Training |  |  |  |
| Sales cycle Training |  |  |  |
| Email Training |  |  |  |
| Phone call Training |  | Misleading  |  |
| Aftersales training |  | Key issued  |  |
| Negotiation Training |  |  |  |

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| Signatures |  |

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| Signed (Sales Account Manager): Date:Signed (Trainer/Group Leader): Date:Signed (Manager / Sales Director): Date: |

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