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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 proof  5. Dummy sample pack  6. Negotiation  7. Order  8. 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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