Sales New Starter Checklist

Name: **Start date:**

Team:

1. **HR induction**

   Employment Contract read and signed

   HR Induction via Zoom or in the office

   New Starter Documentation read and signed via docusign

   Remote Working Policy read and signed (for FT/PT remote employees only)

   Set up Perkbox Account

   Read the New Employee Portal on Flashbay Wiki

   HireRight background application completed and submitted

   Welcome call from HR Manager on Slack/Zoom

   Meet colleagues on Slack Video Call

2. **Password change**

   Zimbra (E-mail)

   NetSuite (CRM)

   Windows (Computer)

3. **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

4. **Initial understanding of NetSuite (CRM system)**

Change Contact's View to Flashbay

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

5. **Initial introduction to Slack**

Create a profile
o Job title
o Country
o Profile/portrait picture of yourself (obligatory)

Add to all the relevant channels
o #remote_training
o #sales_global
o #sales_london
o #sales_ your team
o #group_ your group leader
o #competitors
o #infringement
o #logo_club
o #price_check
o #price_check_existing
o Channel dedicated for Sales order Shout Outs

Understand why and how to @ mention members

Understand how to start a thread

Understand what Slack is and what it's used for

6. **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

Google shopping

7. **Introduction to Flashbay Wiki**

Good understanding of what Wiki can be used for

Know how to look for updates on a weekly basis

8. **Phone training**

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

9. **Email communication**

Where to find templates and know when to use them

What subject line to use

What attachments to include in the email

Follow up structure

10. 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

11. Flashbay online training (MT)

Completed MT

Passed FSE

12. 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

13. Know who to contact internally

Issues with delivery of dummy samples (UPS) - shiptrack@flashbay.com

Issues with delivery of customer order (TNT) – 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_uk Slack channel

General Sales related questions - #remote_training

(Rate 1 – 5 - 5 Very good – 1 not good)	1	2	3	4	5
How confident do you feel using Net Suite?					
How confident do you feel using Zimbra?					
How confident do you feel using Slack?					
How confident do you feel using Bria/SNOM phone?					
How would you rate your product knowledge?					
How would you rate the Sales Hero Academy?					
How would you rate MindTickle (MT)?					
How would you rate the Flashbay Sales Exam (FSE?					

Please share your feedback in the below boxes

How has the first 4 weeks been?

What have you enjoyed the most?

Is there anything you think could be done differently?

How do you structure your day? Time management and MDAR?

Is there anything you'd like additional support with or something you feel unsure of?

Additional comments

Sales Account Manager   **Trainer**

 Date: **Date:**