

Sales New Starter Checklist

Employee Details			
Name:			
Role:		Start date:	
Group Leader:		Territory:	

Welcome, HR & Administrative	Comments	Tick
<ul style="list-style-type: none"> 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 		
Introduction to phone	Comments	Tick
<p>To be covered by group leader/trainer assigned on the first day:</p> <ul style="list-style-type: none"> Show how to use buttons for company extensions directory Practise making, receiving, transferring demo calls 		
Introduction to Zimbra / price list	Comments	Tick
<p>First insight from group leader/trainer assigned:</p> <ul style="list-style-type: none"> 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 <p>Further detail to be provided in the SalesHero Academy</p>		
Introduction to website & sample pack	Comments	Tick
<ul style="list-style-type: none"> Product familiarisation (alongside real sample pack and accessories) Learn FAQs and read wiki Tour of Online Customer Centre (U: tester@flashbay.com, P: tester) 		
Stage by stage analysis of the Sales Cycle (SalesHero Academy Module 3)	Comments	Tick
<ol style="list-style-type: none"> Receiving a lead (show lead examples) Analysing and qualifying the lead (5min. steps 1-4) Response (10min.) <ol style="list-style-type: none"> Phone Email Virtual proof Dummy sample pack Negotiation Order Trustpilot Feedback (show process) Customer follow up 		

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Introduction to CRM Software – NetSuite (SalesHero Academy Module 2)	Comments	Tick
<ul style="list-style-type: none"> • 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 		
Introduction to back-end processes (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> • Explain how the factory works, the shipment and order status emails 		
Virtual proofs, branding methods & image formats (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> • 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 		
Case study (Group Leaders)	Comments	Tick
<p>Replying to an example web lead with quote and virtual proof:</p> <ul style="list-style-type: none"> • 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 		
Payment terms, credit application, payment chasing (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> • Shown step by step the process • Credit requests (<10,000GBP/Credit Auto Assessment) and (>10,000GBP/UK) – text parts 		
Introduction to Flashbay sales concepts (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> • MDAR – As soon stable and achieved, eligible for new leads • 15 minute 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
<ul style="list-style-type: none"> 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 wiring (all calls to be accompanied by email) 			
Session with Trainer			Tick
<ul style="list-style-type: none"> Feedback and suggestions Review of activity Skills improvement Long term goals 			
Comments			
Training Record			
Zimbra Training		Graphics Training	
Netsuite Training			
Sales cycle Training			
Email Training			
Phone call Training		Misleading	
Aftersales training		Key issued	
Negotiation Training			
Signatures			
Signed (Sales Account Manager):		Date:	
Signed (Trainer/Group Leader):		Date:	
Signed (Manager / Sales Director):		Date:	