Sales New Starter Checklist

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

Welcome, HR & Administrative	Comments	Tick
☐ 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
To be covered by group leader/trainer assigned on the first day: ☐ Practice making, receiving, transferring demo calls		

Introduction to Zimbra / price list	Comments	Tick
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 organization and follow-up organization ☐ Setup tabs (price-list, NetSuite, TNT, Flashbay-Homepage…) ☐ Explain price list Further detail to be provided in the SalesHero Academy		

Introduction to website & sample pack	Comments	Tick
☐ Product familiarization (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
1. Receiving a lead (show lead examples) 2. Analyzing 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
☐ 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		
Virtual proofs, branding methods & image formats (Group Leaders)	**Comments**	**Tick**
☐ 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**
☐ 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		
Payment terms, credit application, payment chasing (Group Leaders)	**Comments**	**Tick**
☐ 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**
☐ MDAR – As soon stable and achieved, eligible for new web leads ☐ 15 minutes web lead policy ☐ Every call followed by email policy (email memo) ☐ Understand follow-up stages and frequency		

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

Session with Trainer	Tick
☐ 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			
Aftersales training		Key issued	
Negotiation Training			

Signatures

Signed (Sales Account Manager): Date:

Signed (Trainer): Date:

Signed (Group Leader) Date:

Signed (Manager / Sales Director) Date: