

Sales New Starter Checklist

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

Welcome, HR & Administrative	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> HR Induction / Health & Safety Induction <input type="checkbox"/> Contracts filled and uploaded to NS / all documents read and signed <input type="checkbox"/> Introduction to Handbook, Policies, Sales Manual and Office Manual <input type="checkbox"/> Meet colleagues / tour of office <input type="checkbox"/> 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"> <input type="checkbox"/> Practice 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"> <input type="checkbox"/> Login, compose email, spell check, creating folders, email signature, sharing folders, filters, tags, out of office message <input type="checkbox"/> Setup A-Z email folder organization and follow-up organization <input type="checkbox"/> Setup tabs (price-list, NetSuite, TNT, Flashbay-Homepage...) <input type="checkbox"/> 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"> <input type="checkbox"/> Product familiarization (alongside real sample pack and accessories) <input type="checkbox"/> Learn FAQs and read wiki <input type="checkbox"/> 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"> 1. Receiving a lead (show lead examples) 2. Analyzing and qualifying the lead (5min. steps 1-4) 3. Response (10min.) <ol style="list-style-type: none"> 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
<ul style="list-style-type: none"> <input type="checkbox"/> Understand relationship between record types: customer/lead, contact, sales order, invoice and virtual proof <input type="checkbox"/> How to see own customer/lead list <input type="checkbox"/> List views, list editing, sorting by column header, sort using filters <input type="checkbox"/> Creating customer, contact, sales order <input type="checkbox"/> Duplicate checking (font size) <input type="checkbox"/> Procedure to send samples, sample allowance <input type="checkbox"/> Understand how adding contact records enables user to login to Customer Centre 		
Virtual proofs, branding methods & image formats (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> What is virtual proof and how to request? – text parts <input type="checkbox"/> Guide to image formats. What is resolution? How to check resolution? What is Vector file? <input type="checkbox"/> Understanding of branding methods: screen printing, engraving, photo printing, embossing 		
Case study (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Replying to an example web lead with quote and virtual proof: <input type="checkbox"/> Understanding of lead times <input type="checkbox"/> Use of auto text (pros and cons) <input type="checkbox"/> Pricing strategies - price levels, reseller vs. final customer <input type="checkbox"/> Trainer to pretend to be the customer 		
Payment terms, credit application, payment chasing (Group Leaders)	Comments	Tick
<ul style="list-style-type: none"> <input type="checkbox"/> Shown step by step the process <input type="checkbox"/> 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"> <input type="checkbox"/> MDAR – As soon stable and achieved, eligible for new web leads <input type="checkbox"/> 15 minutes web lead policy <input type="checkbox"/> Every call followed by email policy (email memo) <input type="checkbox"/> Understand follow-up stages and frequency 		

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Real work: Order generation from old web leads (Group Leader Supervision)		Comments	Tick
<input type="checkbox"/> Review lead history in NetSuite (e.g. price, virtual proof, sample, status) <input type="checkbox"/> Gain experience of calling customers (web leads to be called individually) <input type="checkbox"/> Gain experience of email writing (all calls to be accompanied by email)			
Session with Trainer			Tick
<input type="checkbox"/> Feedback and suggestions <input type="checkbox"/> Review of activity <input type="checkbox"/> Skills improvement <input type="checkbox"/> 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 (Team Leader):		Date:	
Signed (Manager/ Sales Director):		Date:	