## Sales New Starter Checklist

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

| Welcome, HR & Administrative | Comments | Tick |
|---|---|---|
| • HR Induction / Health & Safety Induction<br>• Contracts filled and uploaded to NS / all documents read and signed<br>• Introduction to Handbook, Policies, Sales Manual and Office Manual<br>• Meet colleagues / tour of office<br>• Meet Managing Director | | |
| **Introduction to phone** | **Comments** | **Tick** |
| To be covered by group leader/trainer assigned on the first day:<br>• Show how to use buttons for company extensions directory<br>• Practise making, receiving, transferring demo calls | | |
| **Introduction to Zimbra / price list** | **Comments** | **Tick** |
| First insight from group leader/trainer assigned:<br>• Login, compose email, spell check, creating folders, email signature, sharing folders, filters, tags, out of office message<br>• Setup A-Z email folder organisation and follow-up organisation<br>• Setup tabs (price-list, NetSuite, TNT, Flashbay-Homepage…)<br>• Explain price list<br><br>Further detail to be provided in the SalesHero Academy | | |
| **Introduction to website & sample pack** | **Comments** | **Tick** |
| • Product familiarisation (alongside real sample pack and accessories)<br>• Learn FAQs and read wiki<br>• 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)<br>2. Analysing and qualifying the lead (5min. steps 1-4)<br>3. Response (10min.)<br>3.1 Phone<br>3.2 Email<br>4. Virtual proof<br>5. Dummy sample pack<br>6. Negotiation<br>7. Order<br>8. Trustpilot Feedback (show process)<br>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<br>• How to see own customer/lead list<br>• List views, list editing, sorting by column header, sort using filters<br>• Creating customer, contact, sales order<br>• Duplicate checking (font size)<br>• Procedure to send samples, sample allowance<br>• Understand how adding contact records enables user to login to Customer Centre | | |
| **Introduction to back-end processes** (Group Leaders) | Comments | Tick |
| • Explain how the factory works, the shipment and order status emails | | |
| **Virtual proofs, branding methods & image formats** (Group Leaders) | Comments | Tick |
| • What is virtual proof and how to request? – text parts<br>• Guide to image formats. What is resolution? How to check resolution? What is Vector file?<br>• 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:<br>• Understanding of lead times<br>• Use of auto text (pros and cons)<br>• Pricing strategies - price levels, reseller vs. final customer<br>• Trainer to pretend to be the customer | | |
| **Payment terms, credit application, payment chasing** (Group Leaders) | Comments | Tick |
| • Shown step by step the process<br>• 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 leads<br>• 15 minute web lead policy<br>• Every call followed by email policy (memo email)<br>• Understand follow-up stages and frequency | | |

## Sales New Starter Checklist

| 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)<br>• Gain experience of calling customers (web leads to be called individually)<br>• Gain experience of email wiring (all calls to be accompanied by email) | | |

| Session with Trainer | Tick |
|---|---|
| • Feedback and suggestions<br>• Review of activity<br>• Skills improvement<br>• 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: