flashbay®

Sales New Starter Checklist

Employee Details			
Name:			
Role:		**Start date:**	
Group Leader / Trainer		**Territory:**	

Welcome, HR and 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 Deputy Sales Director, Sales Director and Managing Director		
Introduction to phone	Comments	Tick
□ Practice making, receiving, transferring demo calls □ Introduction to wiki		
Introduction to Zimbra / Price List	Comments	Tick
First insight from Group Leader/ Trainer assigned: □ Password change of Zimbra and Windows □ Login, compose email, spell check, creating folders, email signature, sharing folders, filters, tags, out of office message □ Set up A – Z email folder organization and follow up organization □ Set up tabs (Price List, NS, TNT, Flashbay homepage etc). □ Explain Price List □ Provide your territory's 'Reference for quotes' sheet		Yes/ No
Introduction to website & Sample pack	Comments	Tick
□ Product familiarization (website, Sample pack and accessories) □ Read website and wiki Product Knowledge □ Tour of Online Customer Centre (U: tester@flashbay.com P: tester) □ Sister website (where applicable)		

Stage by stage analysis of the Sales Cycle (M3)	Comments	Tick
1. Receiving a lead (show lead examples) 2. Analysing and qualifying the lead (5 mins step 1-4) 3. Response (10 mins) 3.1. Phone 3.2 Email (with use of Quote tool) 4. Virtual Proof 5. Dummy Sample Pack 6. Negotiation 7. Order 8. Trustpilot Feedback (show process) 9. Customer follow up 10. Automatic follow up		
Introduction to CRM Software – NetSuite (M2)	Comments	Tick
□ Understand relationship between record types: lead/ customer. contact, sales order, invoice, virtual proof □ How to see own customer/ lead list □ List views, list editing, sorting by column headers, sort using filters □ Creating customer, contact, sales order □ Duplicate checking □ Procedure to send samples, sample allowance □ Understand how adding contact records enables user to login to Customer Centre		
Virtual Proofs, branding methods & image format	Comments	Tick
□ What is VP and how to request □ Guide to image formats and resolution (how to check, what is vector file) □ Understanding branding methods: screen printing, laser engraving digital/ photo printing embossing		
Case study (Group Leaders)	Comments	Tick
□ Replying to an example web lead with official quote and virtual proof □ Understanding of lead times □ Use of Auto text (pros and cons) □ Pricing strategies - price levels, reseller vs final customer □ When to give special offer, what can be offered (during trial period with and without approval of the Group Leader) □ Trainer to pretend to be the customer		

Payment terms, credit application, payment chasing	Comments	Tick
□ Show step by step the process □ Credit requests (<10,000 GBP / Credit Auto Assessment) □ Credit requests (>10,000 GBP / text parts) □ Payment chasing for overdues and for overdue customers reassigned to new SAM		
Introduction to Flashbay sales concepts	Comments	Tick
□ MDAR – As soon stable and achieved, eligible for new web leads □ 15 minutes web lead policy □ Every call followed by email (memo email) □ Understand automatic follow up □ Understand follow up stages and frequency □ No voicemail policy □ Keeping contacts up to date in NS		
Order generation from old web leads (Group Leader)	Comments	Tick
□ Review lead history in NetSuite (price, VP, 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, next step)		
Session with Trainer		
□ Feedback and suggestions □ Review of activity □ Skills improvement □ Long term goals		

Comments		
Training Record		
Zimbra		
Netsuite		
Sales cycle		
Email		
Phone call		
Aftersales		
Negotiation		
Graphics		
Key issued		**Passwords changed (Zimbra, Windows) Yes / No**

Signed (Sales Account Manager) :

Signed (Trainer):

Signed (Group Leader):

Signed (Team Leader):

Signed (Manager/ Deputy Sales Director/ Sales Director):

Date: