

Sales New Starter Checklist

Name:

Start date:

Team:

Trainer:

1. **HR induction**

- Contract read and signed
- Introduction to Handbook, Policies, Sales Manual and Office Manual
- Meet colleagues/tour of the offices
- Meet the Global CEO (London only)

2. **Password change**

- Zimbra (E-mail)
- NetSuite (CRM)
- Windows (Computer)

3. **Initial introduction to Zimbra (E-mail)**

- A-Z folders created for customers and leads
- Spell check installed
- How to compose a new email
- All 3 tabs in the Pipeline is explained
- Share for the Picture briefcase accepted
- Where to locate sales templates
- Where to locate templates for Virtual Proof, Aftersales and credit requests
- Introduction to the different tabs in Zimbra (e.g. Employee portal)
- How to generate a quote

4. **Initial understanding of NetSuite (CRM system)**

- Understand the difference between a lead and a customer
- How to create a new lead
- How to check for duplicates
- How to generate a pricelist
- How to place a sales order
- How to request dummy samples for customer
- How to keep contact records up to date

5. **Initial introduction to Slack**

- Create a profile
 - Job title
 - Country
 - Profile/portrait picture of yourself (recommended)
- Add to all the relevant channels
 - Sales_Global
 - General
 - Price_Match
 - Competitor
 - Infringement
 - Team Channel
 - Office Channel (i.e London)
 - IT_help
- Explain why and how to @ mention members
- Explain how to start a thread
- Explain what Slack is and what it's used for

6. **Introduction to Flashbay Website**

- Good understanding of our website (FAQ, product knowledge)
- Tour of our online customer centre (U: tester@flashbay.com, P: tester)
- Review our sister websites

7. Introduction to Flashbay Wiki

- Good understanding of what Wiki can be used for
- Been shown how to look for updates on a weekly basis

8. Phone training (not applicable for PH)

- How to answer the phone (e.g. Welcome to Flashbay you are speaking with XXX)
- How to transfer a call
- General phone guidelines such as no voice mail and never put a customer on hold (unless to transfer a call)
- How to make outbound calls, i.e. Country code and how to introduce one self

9. Email communication

- What template to use
- What subject line to use
- What attachments to include in the email
- Follow up structure

10. Understand the importance of the 'Flashbay Global Sales Standard for New Leads'

- All leads to receive a phone call as first point of contact, if missed send email
- Correct template and attachments to initial email
- Timely follow-ups
- Fight for every lead
- Email memo following every call/call attempt

11. Flashbay online training (MT).

- Completed MT
- Passed FSE

12. General understanding of Flashbay

- MDAR – Minimum Daily Activity Record (75 unique activities)
- MPE – Minimum Profit Expectations
- CMPE – Cumulative Minimum Profit Expectations
- NB – New Business
- GP – Gross Profit

13. Know who to contact internally

- Issues with delivery of dummy samples (UPS) - warehouse@flashbay.com
- Issues with delivery of customer order (TNT/FedEX) - shiptrack@flashbay.com
- Unhappy customer – Group Leader and Aftersales
- Unable to attend work (sick) – attendance@flashbay.com and Group Leader
- Who to contact for IT issues – IT_help Slack channel

Comments

Sales Account Manager

Date:

Team/Group Leader

Date:

