



New Employee Training Checklist

7 Jun 2023 / Tracy Easton

Complete

Score	0%	Flagged items	2	Actions	3
Company Name	RTY Technologies, Inc.				
Location	Arkansas, USA (35.20105, -91.8318334)				
New Employee Name	Stuart Jenkins				
Job Title and Department	Sales Associate, Sales Department				
Date Hired	05.06.2023 07:00 PST				
Conducted on	07.06.2023 09:35 PST				
Prepared by	Tracy Easton				

Flagged items & Actions

2 flagged, 3 actions

Flagged items

2 flagged, 0 actions

Training Checklist / Introduction to the Organization

IT and Security

Incomplete

Handled by Everett Bay, IT Specialist, IT Team

Training Checklist / Job-Specific Training / Job-Specific Training 3

Status

Incomplete

Other actions

3 actions

Training Checklist / Introduction to the Organization

When is the target completion date?

14.06.2023 10:00 PST

To Do | Assignee SafetyCulture Staff | Priority Low | Due 14.06.2023 10:00 PST | Created by SafetyCulture Staff

Complete the training for Company Culture.

Training Checklist / Introduction to the Organization

Is there a plan in place to complete this as soon as possible? Specify and assign "Action" steps as needed.

The new employee's WFH equipment is still being shipped, so the network setup and access on Stuart's laptop will be delayed until tomorrow, June 8, at 10 AM.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 08.06.2023 10:00 PST | Created by SafetyCulture Staff

Set up new employee's laptop access.

Training Checklist / Job-Specific Training / Job-Specific Training 3

Is there a plan in place to complete this as soon as possible? Specify and assign "Action" steps as needed.

The other trainer, Emily's teammate, called in sick and can't come in to complete the training for today. To be rescheduled.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 14.06.2023 09:54 PST | Created by SafetyCulture Staff

Reschedule CRM Software and Sales Tools training.

Training Objectives**1. Product Knowledge:**

- Develop a deep understanding of the company's products, including their features, benefits, and competitive advantages.
- Gain knowledge of the target market and customer needs to effectively position and sell the products.

2. Sales Techniques and Strategies:

- Learn and apply effective sales techniques, such as building rapport, active listening, and objection handling.
- Understand the sales process from prospecting to closing, and develop skills to move prospects through each stage.

3. CRM Software and Sales Tools:

- Familiarize with the company's CRM software and other sales tools used for lead management, customer relationship management, and sales reporting.
- Learn to utilize the CRM software effectively to track sales activities, manage customer interactions, and analyze data for insights.

4. Sales Process and Pipeline Management:

- Understand the company's sales process and the key stages involved.
- Learn how to qualify leads, manage opportunities, and effectively move prospects through the sales pipeline.
- Develop skills in forecasting, prioritizing, and managing time to meet sales targets and deadlines.

5. Customer Service and Relationship Building:

- Acquire skills in providing exceptional customer service to build strong relationships with customers.
- Learn to address customer concerns, resolve issues, and maintain customer satisfaction.
- Develop strategies for nurturing long-term customer relationships and fostering customer loyalty.

6. Communication and Negotiation:

- Enhance communication skills, both verbal and written, to effectively communicate with customers and colleagues.
- Learn to present product information and sales proposals persuasively.
- Develop negotiation skills to reach mutually beneficial agreements with customers.

7. Market and Industry Knowledge:

- Stay updated with industry trends, market conditions, and competitor activities.
- Gain knowledge of the target market's needs, preferences, and buying behaviors.
- Continuously learn about industry innovations and advancements to stay competitive.

8. Professional Development:

- Seek opportunities for continuous learning and self-improvement in sales techniques, product knowledge, and industry insights.
- Set personal development goals and actively participate in training programs, workshops, and conferences.
- Stay updated with relevant sales literature, podcasts, and online resources to expand knowledge and skills.

For each lesson, phase, or aspect that will be discussed or handled by different trainers, click "Note" to indicate the trainer's name. Also, attach any relevant documentation and resource materials as needed.

Introduction to the Organization

1 flagged, 2 actions

Company Mission, Vision, and Values

Done

Handled by Sven Rhett, People Partner, HR Department

Overview of the Company's Products and Services

Done

Handled by Tracy Easton, Product and Sales Manager, Sales Department

Company Policies and Procedures

Done

Handled by Sven Rhett, People Partner, HR Department

Organizational Structure and Key Departments

Done

Handled by Sven Rhett, People Partner, HR Department

Company Stakeholders

Done

Handled by Sven Rhett, People Partner, HR Department

Company Benefits and Resources

Done

Handled by Sven Rhett, People Partner, HR Department

[RTY Technologies, Inc. - Employee Benefits & Resources.pdf](#)

Company Culture

In Progress

Handled by Venice Rucker, People Engagement Specialist, HR Department

When is the target completion date?

14.06.2023 10:00 PST

To Do | Assignee SafetyCulture Staff | Priority Low | Due 14.06.2023 10:00 PST | Created by SafetyCulture Staff

Complete the training for Company Culture.

Systems and Tools

Done

Handled by Everett Bay, IT Specialist, IT Team

IT and Security

Incomplete

Handled by Everett Bay, IT Specialist, IT Team

When is the target completion date?

07.06.2023 09:30 PST

Is there a plan in place to complete this as soon as possible? Specify and assign "Action" steps as needed.

The new employee's WFH equipment is still being shipped, so the network setup and access on Stuart's laptop will be delayed until tomorrow, June 8, at 10 AM.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 08.06.2023 10:00 PST | Created by SafetyCulture Staff

Set up new employee's laptop access.

Workplace Safety

Done

Handled by Ross Follese, Health and Safety Manager, HR Department

Job-Specific Training

1 flagged, 1 action

Job-Specific Training 1

Training Name

Product Knowledge and Features

Training Description

Training on the company's products, their features, and how to effectively communicate their benefits to customers.

Trainer Name

Sarah Johnson

Status

Done

Job-Specific Training 2

Training Name

Sales Techniques and Strategies

Training Description

Training on effective sales techniques, building customer relationships, and closing deals.

Trainer Name

Mark Davis

Status

In Progress

When is the target completion date?

08.06.2023 11:00 PST

Job-Specific Training 3

1 flagged, 1 action

Training Name

CRM Software and Sales Tools

Training Description

Training on the company's CRM software and other sales tools used to manage customer relationships and track sales activities.

Trainer Name

Emily Thompson

Status

Incomplete

When is the target completion date?

07.06.2023 09:00 PST

**Is there a plan in place to complete this as soon as possible?
Specify and assign "Action" steps as needed.**

The other trainer, Emily's teammate, called in sick and can't come in to complete the training for today. To be rescheduled.

To Do | Assignee SafetyCulture Staff | Priority Low | Due 14.06.2023 09:54 PST | Created by SafetyCulture Staff

Reschedule CRM Software and Sales Tools training.

Job-Specific Training 4

Training Name

Sales Process and Pipeline Management

Training Description

Training on the company's sales process, including lead generation, qualification, and managing the sales pipeline.

Trainer Name

Mark Davis

Status

Done

Job-Specific Training 5

Training Name

Customer Service and Conflict Resolution

Training Description

Training on providing exceptional customer service and effectively resolving customer concerns or conflicts.

Trainer Name

Sarah Johnson

Status

Done

Other Training

Other Training 1

Training Name

Communication Skills

Training Description

Training on effective verbal and written communication skills, including active listening and professional email writing.

Trainer Name

Michael Wilson

Status

Done

Other Training 2

Training Name

Time Management and Prioritization

Training Description

Training on managing time effectively, prioritizing tasks, and meeting deadlines.

Trainer Name

Emma Thompson

Status

Done

Other Training 3

Training Name

Teamwork and Collaboration

Training Description

Training on fostering teamwork, collaborating with colleagues, and contributing to a positive team culture.

Trainer Name

John Anderson

Status

In Progress

When is the target completion date?

07.06.2023 15:30 PST

Completion

Feedback

Overall, Stuart has shown enthusiasm and a strong willingness to learn during the training sessions. He has grasped the product knowledge well and has started implementing some sales techniques. However, more practice and guidance are needed in utilizing CRM software and effectively managing the sales process. Stuart has also shown good communication skills and the ability to work well in a team environment.

Other Comments and Recommendations

Stuart would benefit from additional coaching and mentoring to improve his sales skills and gain confidence in managing the sales process. It would be helpful to assign an experienced sales teammate as his training accountability buddy for ongoing support and guidance.

Next Evaluation Date

04.09.2023 09:00 PST

Employee Name and Signature

Stuart Jenkins
07.06.2023 09:58 PST

Manager/Supervisor/Trainer Name and Signature



Tracy Easton
07.06.2023 14:42 PST

Media summary

[RTY Technologies, Inc. - Employee Benefits & Resources.pdf](#)