

# Daily Routine Checklist

Sales/Marketing Dept.  
Sales Manager



## Monday 10:00 a.m. meeting with General Manager

- Clocked-In System100
- Phone Calls returned, and E-mail messages replied to (Used System100 for notes)
  - Responded to production issues concerning sales-staff's clients (If applicable)
- Production Administrator notified of an production issues concerning sales staff via email
- System100 | Special Tasks, Inhouse Emails and Company Memos reviewed (Dashboard)  
*(If late or have been absent, Absenteeism form submitted in System100)*
- Calendar (System100) Reviewed – Personal and Company Events
- Daily To-do's updated System100
- Special Tasks assignments reviewed, if worked-on, status updated (System100 Task)

### ■ MARKETING

- Post written, reviewed and posted to Company's *Facebook*
- 1<sup>st</sup> of Month
  - Blog written, reviewed and uploaded to Company's Website – Auto posted to *LinkedIn, Google Plus* and *Facebook*, checked to insure arrival.
  - Marketing Responder written and scheduled in *Constant Contact*

1<sup>st</sup> of Month

### Sales Staff Meetings & Reporting

- Meeting scheduled this month, with each individual sales person (System100)
- Reports pulled & printed on each sales person's *Telephone Calls/Field Appointments* made for prior month;
  - Suspects ■ Prospects ■ Customer Courtesy ■ Appointment in Field
- Meeting completed with each individual sales person and meeting notes entered (System100)
  - Quotes *Won/Loss Report* discussed and reasons for winning or losing
  - Monthly Sales by Individual Salesperson
  - Sales goal discussed expected and reason why
  - Sales forecasts discussed *(If applicable)*
  - Suggestions for *System Updates, Customer Feedback* for new products, *Marketing Material* improvement or other suggestions to improve the department or the company discussed with each sale person and submitted to management (System100 TQM Suggestion)
  - Special Tasks/Projects for individual sales person discussed and/or updated (System100 Tasks)

End of Day

- Office (Personal) - Cleaned and Organized before leaving end-of-day (See 100% system of Cleanliness Procedure *GM-015*)
- AC turned up to 80° OR heat turned down to 68°
- Clocked-out (System100) & printed Time Sheet (landscape format)
- Coffee Pots turned-off in Sales Break Room
- Notified all employees *(required by management)* of my departure for the day

- Daily Routine Checklist (*SM-905*) & Time sheet placed in designated location or submitted via System100.

Yearly – 1<sup>st</sup> of Jan

- Reviewed Sales Department Operations Manual for updates

I have checked as completed, or acknowledged not completed by a line drawn through, every PROMPT on this Checklist:

X \_\_\_\_\_

Date: \_\_\_\_/\_\_\_\_/2018