

Daily Routine Checklist

Sales/Marketing Dept.
Salesperson – Bob T.



Monday 10:00 a.m. meeting with General Manager & Sales Manager

- Clocked-in System100
- Email reviewed (Outlook 365) - responded to urgent customer & production issues via email & phone call
- E-mail messages (Other) replied to & Phone Calls returned (Used System100 CRM for notes)
- Client Estimates completed by CSR/Estimator reviewed, if OK, submitted to Client, if NOT CSR/Estimator notified via email of correction needed.
- 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
- Jobs In-Progress/ Proofs Due**, Followed-up (if applicable)
- Production Administrator notified if any of my customers' Jobs or Proofs are behind schedule
- Non-conformances on my customers' jobs reported to Management via System Buster - CAPA (PA-333)
- Customers advised of cost for any changes to specifications, and obtained approval to authorize production to proceed (see Change Order Form (PA-338) (IF APPLICABLE))
- Customer Quotes followed-up via telephone (All Responses noted in System100 CRM)
- Press-checks pending, my personal CSR notified for scheduling
- New Customer Accounts onboarded (See New Account Onboarding checklist AD-212)

Telephone calls using System100

- Suspect** calls made: _____ **Goal 30** (Once determined Suspect not a good fit to upgrade to Prospect, move to No-Opportunity Category)
- Prospect** calls made: _____ **Goal 10** (Once determined Prospect not a good fit, move to No-Opportunity Category)
- New Appointments** scheduled: _____ **Goal 2** (Put in System100 Calendar)
- Customer Courtesy** calls made: _____
- Customer Servicing** calls made: _____
- Quotes Pending followed-up, notes entered (System100 CRM) for reason Won/Loss
- Daily Schedule of To-do's updated System100
- Promotional Materials gathered for mailing to Suspects/Prospects and placed in designated location (_____ Quantity sent)
- Gathered all documents (proofs, quotes, promotional materials, samples) for today's field activities
- Notified all employees (required by management) of my departure into Field

Schedule new appointments & customer meetings in the afternoon. This will keep you on schedule to meet your Calls goal.

Departed Into Field

Returned From Field

- Field Cold Calls** (Suspects visited while in the field: QTY _____)
- Suspects visited in field prioritized to *Prospects*, contact information entered (System100 CRM)
- Phone Calls returned, and E-mail messages replied to (Used System100 for notes)
- Customer Estimates completed by CSR/Estimator reviewed, if OK, submitted to Client, if NOT OK CSR/Estimator notified via email of correction needed (NOTE: new estimates completed while you were in field)
- Special Tasks assignments reviewed, worked-on and status updated (System100 Task)
- My Office - 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°
- Coffee Pots turned-off in Sales Break Room
- Suggestions for System Updates, Company Projects or other Suggestions to improve my department or company submitted to management (System100 TQM Suggestion)
- Clocked-out (System100) & printed Time Sheet (landscape format)
- Daily Routine Checklist (SM-905) & Time Sheet placed in designated location or submitted.

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

x _____

Date: ____/____/2018

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*
- 1st 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*

1st 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 – 1st 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