

SALES ACCOUNT EXECUTIVE BASIC TRAINING SCHEDULE

NAME: _____

Please schedule meetings with all those listed below and ask each person to initial next to the task after it has been completed. If you have any questions or concerns, please see Troy Rutledge, Vice President of National Sales.

	DATE COMPLETED	EMPLOYEE INITIALS	INSTRUCTOR	INSTRUCTOR INITIALS
COMMUNICATIONS				
Job Description, Paperwork, Intranet, Office Set-Up			Jim Webb x5586 – HR Manager Cristi Trost x5276 – HR Generalist	
Phones and Email: Outlook, Voice Mail			Meko Hadzic x5550 – Sr. Helpdesk Technician	
Office Introductions Customer and Prospect List Information			Jim Benedict x5269 – Vice President of Sales	
DAILY REPORTS				
Introductions and Overview Project Management Systems & Workflow Account Support & Escalation Services Project Manager Support			Kevin Weiss x5360 – Client Services Lead	
ESTIMATING				
Introductions and Overview Read and Understand Estimates Fill Out Request for Estimate			Elsa Keil x5325 – Estimator Lead	
BILLING				
LEARN AND UNDERSTAND: Job Costing Report Billing Process New Customer Form Procedures Credit (Credit Memo) Collections			Ivy Lee x5559 – CFO	
Invoicing Postage Collections Procedures			Gina Krusemark x5273 – Accounting	
FORMS				
Deferred Sales			Jim Benedict x5269 – Vice President of Sales	
DIRECT CONNECT DEMO IN IDEA ROOM				
Direct Connect Direct Connect Lite			Soraida Henne x5564 – Technical Service Representative Jim Benedict x5269 – Vice President of Sales	
MARKETING AND SALES				
Marketing and Sales Materials			Jim Benedict x5269 – Vice President of Sales	

DATE
COMPLETEDEMPLOYEE
INITIALS

INSTRUCTOR

INSTRUCTOR
INITIALS

DEPARTMENT INTRODUCTIONS				
Packaging/CAD Design Overview			Mike Pollock x5378 – Structural Designer	
Manufacturing Overview Press Overview Finishing Overview Mailing Overview – Inserting, Inkjet, Laser, Polybag			Scott Andres x5224 – VP of Operations	
Premedia Overview Digital Press Overview Data Processing Overview			Scott Andres x5224 – VP of Operations	
Distribution Overview			Rob Koosmann x5582 – Distribution Manager	
Scheduling System Overview			Shawn Heitz x5262 – Scheduler	
Purchasing System Overview FSC/SFI Outside Services Overview			Mark Jacobs x5590 – Purchasing Lead	
Continuous Improvement and Quality/ISO Overview			Danette Reis x5589 – IT Security & Compliance Manager	
Promotional Products Overview			Emilio Berriz x5252 – Director of Promotional Products	
DEBRIEF	Jim Benedict x5269 – Vice President of Sales			

Notes:
