CFAS2.8 - SQA Unit Code H5KE 04
Develop, implement and monitor sales call plans

Overview

This unit is all about developing an effective sales call plan. An effective plan is one that enables sales team members to meet their personal sales targets. It also leads to the achievement of organisational turnover, profit and growth targets.

The unit is designed to ensure that you prepare call plans covering each individual customer. The plan ensures that customer needs are identified and opportunities for selling, up-selling, and cross-selling are fully exploited.

You will need to show professionalism and sensitivity towards your customers and your desire to meet customer needs at all times.

This unit is suitable for face-to-face selling, telesales and online selling

This unit is suitable for Sales Executives

Performance criteria

You must be able to:

P1 identify customers and prospects to contact by telephone, email or in person
P2 determine the time available to deal with your prospective or existing customer in order to plan time effectively
P3 prepare and assemble sales materials and sales angles that can be used during your contact with customers or prospects
P4 identify personal sales targets appropriate to your customer base and access to prospects
P5 seek to identify your customer's or prospect's current situation, needs and wants in relation to products and services, using a variety of effective questioning techniques
P6 identify competitors with whom your prospect or customer has any connections
P7 highlight your own organisation's strengths and use testimonials to demonstrate the benefits and features of your organisation's products and services
P8 seek to show how your organisation's products and services can solve customer problems and add value and benefit to the customer experience
P9 use questions to identify specific customer needs and wants
P10 establish the strength of the prospect and their level of interest
P11 identify actions that need to be taken to progress and close the sale
P12 review the call to identify ways of improving your sales techniques

Knowledge and understanding

You need to know and understand:

K1 how to develop a call plan and record the outcome of each call effectively
K2 the sales cycle and how it helps you to structure and progress sales contacts
K3 techniques that can be used when selling face-to-face or on the telephone, including cross-selling and up-selling
K4 methods for estimating maximum and minimum returns and how to prioritise calls according to the potential value and probability of a sale
K5 listening and questioning techniques for selling or progressing a sale over the telephone
K6 the difference between benefits and features and how to sell them effectively
K7 how to involve your prospect in reaching a decision about the sale
K8 methods for recording messages accurately and ensuring they are dealt with by relevant people promptly
K9 the range of behaviours displayed by customers and how to manage them constructively
K10 how to overcome customers' objectives sensitively, constructively and effectively when responding to their queries
K11 effective methods for closing a sale
K12 how to evaluate and measure the success of sales calls
K13 the range of interactive information and communication technology (ICT)equipment available to support effective sales activities

Sector specific knowledge and understanding

K14 legal, regulatory and ethical issues relating to sales, including the purchase and use of contact lists
K15 organisation and sector regulatory requirements and practices relating to selling and customer transaction records
K16 the practices and activities of your competitors

Context specific knowledge and understanding

K17 your organisation's objectives and plans for telephone sales activities
K18 organisational procedures for call planning
K19 organisational templates and pro form as available for recording sales calls
K20 your organisation's products and services
K21 your organisation's customer base analysed segment by segment
K22 organisational policies, procedures and service offers that relate to products and services
K23 competitor activities, products and services and the latest developments

in your organisation's markets

K24 sales targets for your own area of responsibility and limits of your personal authority

K25 organisational procedures for recording customer call information and follow-up activities

K26 who to keep informed about important customer call information

K27 organisational procedures for closing orders and securing sales, including organisational guidelines on after-sales agreements

K28 customer and prospect feedback activities and how to channel the information effectively

K29 your organisation's interactive technology requirements relating to sales activities

K30 available literature and support materials for the selling process

K31 support and technical assistance available to sales team members

K32 organisational methods for evaluating and measuring sales success

Additional Information

Behaviours

1. you show respect for customers, understand and empathise with their views
2. you make contact to make an appointment ahead of a sales call where appropriate
3. you are honest, sincere and ethical in your sales approach
4. you are articulate and a good listener and you use appropriate verbal and non-verbal communication
5. you plan the use of time effectively
6. you work with other sales team members to avoid duplication and maximise sales opportunities

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Developed by	CFA Business Skills @ Work
Version number	1
Date approved	April 2010
Indicative review date	April 2012
Validity	Current
Status	Original
Originating organisation	Chartered Institute of Marketing
Original URN	S2.8
Relevant occupations	1132 Marketing and sales managers 3542 Sales representatives 7113 Telephone salespersons 7129 Sales related occupations nec
Suite	Sales 2010
Key words	Sales, sales functions, sales strategy, selling