

Overview

What this Unit is about

This Unit is about the activities involved within the sales cycle in matching products/services to customers' needs. It focuses upon face-to-face selling activity, and also applies to telephone contact. It includes generating sales leads, identifying customers' buying needs, promoting the features and benefits of relevant products/services, addressing queries/ objections and closing sales with mutually beneficial terms and conditions.

Who is the Unit for?

This Unit is recommended for those involved in the selling of their organisation's products/services, but are not necessarily sales specialists. For example, such individuals might be 'general' managers within larger organisations, or managers and/or proprietors within small to medium-sized organisations.

Related specialist Units

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB Units: Sales Units 7.1. *Generate and Follow-up Sales Leads*, 7.2. *Sell Products and Services Face-to-face*, 7.5. *Manage and Facilitate Case Negotiations*, 7.6. *Handle Objections and Close Sales*, and 7.8. *Demonstrate Compliance with Legal, Regulatory and Ethical Requirements*. Details of these Units can be accessed via www.msssb.org.

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Performance Criteria

- You must be able to:*
- 1 Contact customers identified as sales leads, accessing those who can make buying decisions.
 - 2 Identify customer requirements through careful questioning, checking for understanding and summarising their buying needs and interests.
 - 3 Identify the key features and associated benefits of your relevant products/services, relating these to the needs identified.
 - 4 Discuss and assess with the customer those of your products/services which are suitable for their needs.
 - 5 Evaluate potential trade-offs, whereby particular aspects of the product/service's package might be enhanced whilst others of lesser importance might be reduced, which will be beneficial both to the customer and to your organisation.
 - 6 Provide accurate information and make proposals regarding products/services and pricing, where relevant, that meet the customer's requirements.
 - 7 Explore any queries or objections raised by the customer and identify any reasons holding the customer back from agreeing the sale.
 - 8 Identify and prioritise any concerns, and provide evidence to the customer of the strengths of your organisation and its products/services relevant to addressing the concerns.
 - 9 Check that the customer agrees how any concerns can be overcome.
 - 10 Interpret verbal and non-verbal buying signals given by the customer and act upon them accordingly in progressing towards closing the sale.
 - 11 Close the sale by gaining the commitment of the customer.
 - 12 Agree future contact arrangements, including post-sales calls to confirm customer satisfaction where relevant.
 - 13 Record all required details accurately and clearly.
 - 14 Fulfil all relevant legal, regulatory and ethical requirements.

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Behaviours

You will exhibit the following behaviours:

- 1 You present information clearly, concisely, accurately and in ways which promote understanding.
- 2 You show respect for the views and actions of others.
- 3 You work towards 'win-win' solutions.
- 4 You keep promises and honour commitments.
- 5 You work to develop an atmosphere of professionalism and mutual trust.

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Knowledge and Understanding

You need to know and understand:

General knowledge and understanding

- 1 The difference between influencers and decision makers and their relative roles in the decision-making process.
- 2 The key stages in the sales cycle, and how to use this effectively in structuring the sales approach.
- 3 The importance of listening effectively, and of confirming understanding.
- 4 The importance of effective questioning techniques and how to use these.
- 5 The difference between features and benefits, and how to use these effectively in selling.
- 6 The typical range of behaviours displayed by customers, including body language, and how to respond to these constructively in a sales situation.
- 7 Typical objections that can arise in a selling situation, including the difference between sincere and insincere objections, and how to manage these effectively.
- 8 Effective methods for closing sales.

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Knowledge and Understanding

You need to know and understand:

Industry/sector specific knowledge and understanding

- 1 Legal, regulatory and ethical requirements impacting upon selling in your sector.

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Knowledge and Understanding

You need to know and understand:

Context specific knowledge and understanding

- 1 Your organisation's sales plans and objectives, including its target market, key customers and their requirements from your products/services.
- 2 Your organisation's products/services, and their features and benefits.
- 3 Your organisation's structure and lines of decision-making.
- 4 Competitor sales activities, and key features of their products/services.
- 5 Your own sales targets and plans for achieving these.
- 6 Your organisation's sales process and procedures, including recording requirements.
- 7 Available literature and materials to support the selling process.

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Evidence Requirements

PC	Evidence of Performance Criteria: ◆ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
	Activities you have participated in and actions you have taken to sell products/services to customers				
PC1	◆ e-mails and other communications with customers identified as sales leads before the sale has been made	1, 2, 4, 5	1, 2, 3	1	2, 3
PC2	◆ notes of formal and informal meetings and discussions with customers identified as sales leads, including your preparation notes on your organisation and its products and services	1, 2, 3, 4, 5	1,2,3,4,6,7	1	2,3,4,5,7
PC3					
PC4					
PC5	◆ e-mails, notes of meetings and other communications with members of your organisation on its products/services and how they may meet the requirements of particular customers	1, 2, 3	2, 5		1,3,7
PC6					
PC7					
PC8	◆ e-mails and other communication on enhancements in your products/services to meet requirements of particular customers	3, 5	2, 5		1,2,3
PC9					
PC10	◆ records of agreements with customers including sales contracts	3, 4, 5	8	1	6
PC11	◆ communications with customers (e-mails, letters etc.) after the sale has been closed	4, 5	3, 4, 6, 8	1	6
PC12					
PC13					
PC14	◆ records of contacts with customers including any notes on these contacts	3, 4, 5	3,4,6,7, 8	1	3,4,5,6,7
	◆ personal statements (reflections on your own actions to prepare a sales proposal)	1, 2, 3, 4, 5	-		