

CFAS5.3 - SQA Unit Code H5KH 04

Develop and deliver a professional sales presentation



Overview

This unit focuses on developing and delivering effective sales presentations to maximise sales potential. Both formal and informal presentations are required for existing and potential customers.

The unit is about how to develop and deliver a presentation, including considering your customer's needs and preparing a presentation to meet those needs.

You should be prepared to give a dynamic and effective sales presentation to suit your target audience. The presentation should be pre-planned and provide opportunities for questions to be asked.

You should be prepared to take advantage of all opportunities to practice delivering a presentation and evaluate your personal performance in order to improve future presentations.

This unit is for; Sales Team Leaders and Sales Executives

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Performance criteria

You must be able to:

- P1 assess your customer's needs and their interest in your organisation's products and services
- P2 consider the audience, timing, place and purpose of the presentation and how these affect the development of the presentation
- P3 set objectives for the sales presentation ensuring they reflect your customer's needs and interests
- P4 assess the venue for the presentation and consider issues relating to its size, acoustics, and layout
- P5 identify and evaluate the most suitable audio visual aids for effective and innovative delivery of a presentation and the promotional material that will most complement and enhance your presentation
- P6 ensure that your presentation includes all your unique selling propositions and attracts attention from your customer
- P7 structure your presentation in a way that maximises the impact of the information and ideas in it and ensure that it complements any proposal supplied to your customer
- P8 make final preparations for your presentation including preparation of speaker notes and a rehearsal
- P9 deliver your presentation professionally and provide your audience with opportunities to ask questions and raise objections, listening carefully to their concerns, and respond positively and effectively
- P10 aim to gain commitment to progress and, if possible, close the sale
- P11 evaluate the presentation and apply what you find to the planning of future presentations

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Knowledge and understanding

You need to know and understand:

- K1 the importance of presentations and when and how they can be used for selling
- K2 the difference between formal and informal presentations
- K3 how customer characteristics and behaviour influence the buying decision
- K4 the importance of presentation aims and objectives and how to set them effectively
- K5 the range of visual aids available for sales presentations
- K6 the importance of assessing the venue for a presentation in advance
- K7 typical sources of information required for presentations and where and how to obtain it
- K8 how to use verbal and non-verbal communications effectively in presentations
- K9 how to show customers you are listening to them and understanding their needs and wants
- K10 legal, social and ethical constraints affecting your presentation and the way in which it is delivered
- K11 health and safety requirements relating to the delivery of presentations

Industry/Sector specific knowledge and understanding

- K12 presentation custom and practice in your sector

Context specific knowledge and understanding

- K13 sales objectives and targets for your own area of responsibility and organisation
- K14 what resources are available to support sales presentations
- K15 visual aids including presentation templates and product or service demonstration items
- K16 sales literature and promotional offers that are complementary to the presentation and will assist in securing the sale
- K17 testimonials from satisfied customers that can be used in your presentation
- K18 organisational custom and practice for presentations
- K19 who to go to for technical support and design requirements
- K20 the organisational process for evaluating and reviewing presentations
- K21 organisational methods for reporting and recording the outcome of presentations

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Additional Information

Behaviours

1. you analyse customer needs and wants in relation to the presentation and the possible sale
2. you reflect on the range of presentation resources and visual aids at your disposal
3. you are sensitive to audience needs at all times and inspire confidence in them through your personal presentation style
4. you demonstrate an appropriate range of verbal and non-verbal communication
5. you present professionally at all times
6. you present information clearly, accurately and at a pace which develops

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3542 Sales representatives
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7129 Sales related occupations nec

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