

H121 04 (CFAS7.3) Sell products or services over the telephone

What is this Unit about?

This Unit is about identifying, developing and closing sales over the telephone from both inbound and outbound calls.

The Unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The Unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

Who is this Unit for?

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

Sales Executives and Sales Team Leaders.

Outcomes of effective performance

You must be able to:

- 1 Identify your objectives for selling products and services over the telephone both by making and receiving calls.
- 2 Use call lists or leads provided by your organisation and prospect those most likely to produce sales.
- 3 Assess the potential of prospects and prioritise calls according to value and probability of closure.
- 4 Plan sales calls and identify how to obtain customer information and relaying key sales messages.
- 5 Use structured questions to obtain information from prospective customers about their needs.
- 6 Use structured questions to explain the major benefits of using key products or services and to demonstrate their compatibility with features and functions.
- 7 Explain the benefits and features of your products or services, interpret your prospect's reaction to those and decide how best to progress the sale.
- 8 Deal with customer queries and objections with clear and accurate responses.
- 9 Agree the basis of your customer's interest and their overall requirements.
- 10 Gain a commitment from your customer and close the sale.
- 11 Grasp opportunities to develop a positive relationship with customers and identify and pursue further customer contact.
- 12 Provide customer feedback and reaction to products or services to appropriate people in your own organisation.

Behaviours which underpin effective performance

- 1 You show respect for customers and understand and empathise with their views.
- 2 You are honest, sincere and ethical in your telephone sales approach.
- 3 You communicate articulately and listen actively.
- 4 You adopt appropriate verbal and non-verbal communication options.
- 5 You use the most effective questioning techniques for the sales situation.
- 6 You adapt your behaviour to audience requirements.
- 7 You work with other sales team members to avoid duplication and maximise sales opportunities.

Knowledge and Understanding

You need to know and understand

General Knowledge and Understanding

- 1 The sales cycle and how it helps sales team members to structure and progress their sales contacts.
- 2 The differences between inbound and outbound telephone selling.
- 3 The different situations in which telephone selling is appropriate and the advantages and disadvantages of selling by telephone.
- 4 The differences between proactive and reactive selling.
- 5 Techniques that can be applied when selling on the telephone, including cross-selling, up-selling and selling add-ons.
- 6 Methods for assessing maximum and minimum potential and how to prioritise calls according to value and probability of closure.
- 7 Verbal, non-verbal, listening and questioning techniques suitable for selling over the telephone.
- 8 How to operate your telephone system efficiently.
- 9 The differences between benefits and features and how to sell them effectively.
- 10 How to involve your prospect in developing and closing a sale.

- 11 Methods for recording messages accurately and ensuring they are dealt with by relevant people promptly.
- 12 The range of behaviours displayed by customers and how to manage them constructively.
- 13 How to overcome customers' objections sensitively, constructively and effectively.
- 14 Effective methods for closing sales.
- 15 How to evaluate and measure the success of telephone sales calls.
- 16 The range of interactive ICT options available to support effective telephone sales activities.

Sector/Industry specific Knowledge and Understanding

- 1 Legal, regulatory and ethical constraints relating to telephone sales and the purchase and use of telephone contact lists.
- 2 Regulatory requirements relating to the completion of customer transaction documentation.
- 3 Competitive practices and activities.

Context specific Knowledge and Understanding

- 1 Organisational objectives and plans for telephone sales contacts.
- 2 The structure of your organisation and its products or services.
- 3 Organisational policies and procedures relating to your products or services.
- 4 Your organisation's target market and its significant features.
- 5 Competitor activities, products and services and latest developments in your organisation's markets.
- 6 Sales targets for your own area of responsibility and the limits of your personal authority.
- 7 Processes for recording customer call information and follow-up activities.
- 8 Who to communicate with about important information relating to customer calls.
- 9 Your organisation's requirements for closing sales and securing orders.
- 10 Customer and prospect feedback activities and how to channel the information effectively.
- 11 Available literature and support materials for the selling process.
- 12 Who to go to secure effective sales support for customers.

Evidence Requirements

To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria and Knowledge and Understanding.

- 1 As part of the assessment for this qualification, you must have access to a work or realistic work environment (RWE).
- 2 You must provide evidence that shows you have done this over a sufficient period of time with different customers on different occasions for your assessor to be confident that you are competent.
- 3 You must provide evidence of the use of verbal and non verbal buying signals.
- 4 You must provide evidence of both formal and informal feedback.
- 5 You must provide evidence that all sales activities take account of:
 - ◆ regulatory and/or legislative requirements
 - ◆ ethical constraints
 - ◆ the policies and procedures of your own organisation.

