

Unit: SP2 Generate and follow up sales leads (MSSSB Sales Unit 7.1)

Overview

This unit is an integral part of the sales cycle. It involves making initial contact with sales leads through a variety of different methods and establishing their needs. You need to advise potential customers of any products that may interest them and take the opportunity to promote further related products to them. You need to obtain and record information about the contact you have with customers. This will include their buying needs and any further action required. You should also collect relevant information about other suppliers. Most of all you should discover whether a customer's interests suggest that there may be an opportunity for up selling or cross selling.

Outcomes of effective performance

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| <p>SP2/O1. You contact customers who have been identified as sales leads and establish initial communication</p> <p>SP2/O2. You obtain access to the person who can make buying decisions</p> <p>SP2/O3. You identify and confirm your customer's interest in particular products or services</p> <p>SP2/O4. You make further contact with your customer to interest them in your organisation's products or services</p> <p>SP2/O5. You maintain clear records of contact with customers and any further action which may be required</p> <p>SP2/O6. You identify the reasons why customers are interested in particular products or services and clarify opportunities for selling, up-selling and cross-selling</p> <p>SP2/O7. You explain the features and benefits of products or services to customers</p> | <p>SP2/O8. You respond effectively to your customer's queries and objections or offer alternative products or services</p> <p>SP2/O9. You provide details about the possible terms of sales</p> <p>SP2/O10. You convert cold prospects to warm prospects by securing agreement to further contact with a specific sales agenda</p> <p>SP2/O11. You inform colleagues about possible opportunities for cross-selling and up-selling</p> <p>SP2/O12. You pass information about customers and their buying needs promptly and accurately to appropriate people within your organisation</p> |
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Behaviours which underpin effective performance

- SP2/B1. You are customer focused at all times
- SP2/B2. You actively pursue further contact with the customers
- SP2/B3. You conduct sales business with your customer in a way which promotes goodwill and positive thinking
- SP2/B4. You remain sensitive to the needs of your customer at all times
- SP2/B5. You demonstrate a knowledge of the features and benefits of your products or services
- SP2/B6. You use effective questioning and listening techniques to establish customer interest
- SP2/B7. You exploit sales opportunities
- SP2/B8. You are not afraid to say no to unreasonable customer requests
- SP2/B9. You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work
- SP2/B10. You comply with legal requirements, industry regulations and professional codes

Knowledge and understanding

- 1. How to obtain access to key decision makers
- 2. The most effective ways of contacting different types of customers
- 3. How to identify and collect information about customers and competitors
- 4. How to pursue opportunities for further contact with customers
- 5. The purpose of maintaining sales leads information at all stages and how to update systems recording systems
- 6. How to share information on customers with key people in your organisation
- 7. How the information provided by customers is assessed for potential up-selling and cross-selling
- 8. The difference between benefits and features in the context of selling and how to highlight them both
- 9. How to provide alternative solutions to customer problems
- 10. How to handle customer queries and objections
- 11. Industry practices relating to creation and following up of leads
- 12. Legislation and regulation relating to generating and following up sales leads in your industry/sector
- 13. Competitive practice in your sector

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14. Ethical codes of conduct relating to the generating and following-up of leads in your industry/sector
15. Organisational sales strategies, sales plans and sales activity plans
16. Customer segmentation strategies implemented by your organisation
17. Organisational practices for acquiring contact lists and databases
18. How to access records of customers who have high order value potential or up-selling and cross-selling opportunities
19. Organisational procedures for recording customer information
20. Practices relating to sharing of customer information across your organisation
21. The terms of sale available to customers
22. The information you can give customers including price and service features
23. When to refer customers to specialist sales teams or account managers
24. Who to inform about unsuccessful and unfruitful leads
25. Organisational procedures for recording information about customers' buying needs