

Unit: SP5 Develop, implement and monitor sales call plans (MSSSB Sales 2.8)

Overview

This unit is all about developing an effective sales action plan. An effective action plan is one that enables you and your colleagues to meet their personal sales targets. It also leads to the achievement of performance targets. You need to monitor performance against those targets and adjust your plans as appropriate. The unit is designed to ensure that you prepare action 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.

Outcomes of effective performance

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| SP5/O1. You identify customers and prospects to contact by telephone, email or in person | SP5/O7. You highlight your own organisation's strengths and use testimonials to demonstrate the benefits and features of your organisation's products and services |
| SP5/O2. You determine the time available to deal with your prospective or existing customer in order to plan time effectively | SP5/O8. You seek to show how your organisation's products and services can solve customer problems and add value and benefit to the customer experience |
| SP5/O3. You prepare and assemble sales materials and sales angles that can be used during your contact with customers or prospects | SP5/O9. You use questions to identify specific customer needs and wants |
| SP5/O4. You identify personal sales targets appropriate to your customer base and access to prospects | SP5/O10. You establish the strength of the prospect and their level of interest |
| SP5/O5. You 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 | SP5/O11. You identify actions that need to be taken to progress and close the sale |
| SP5/O6. You identify competitors with whom your prospect or customer has any connections | SP5/O12. You review the call to identify ways of improving your sales techniques |

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Behaviours which underpin effective performance

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| <p>SP5/B1. You show respect for customers, understand and empathise with their views</p> <p>SP5/B2. You work cooperatively with colleagues to develop and implement effective sales action plans</p> <p>SP5/B3. You are honest, sincere and ethical in your sales approach</p> <p>SP5/B4. You are articulate and a good listener and you use appropriate verbal and non-verbal communication</p> <p>SP5/B5. You plan the use of time effectively</p> <p>SP5/B6. You work with other sales team members to avoid duplication and maximise sales opportunities</p> <p>SP5/B7. You carry out tasks with due regard to your organisation's policies and procedures, including those covering health and safety at work</p> <p>SP5/B8. You comply with legal requirements, industry regulations and professional codes</p> | <p>4. Methods for estimating maximum and minimum returns and how to prioritise calls according to the potential value and probability of a sale</p> <p>5. Listening and questioning techniques for selling or progressing a sale over the telephone</p> <p>6. The difference between benefits and features and how to sell them effectively</p> <p>7. How to involve your prospect in reaching a decision about the sale</p> <p>8. Methods for recording messages accurately and ensuring they are dealt with by relevant people promptly</p> <p>9. The range of behaviours displayed by customers and how to manage them constructively</p> <p>10. How to overcome customers' objectives sensitively, constructively and effectively when responding to their queries</p> <p>11. Effective methods for closing a sale</p> <p>12. How to evaluate and measure the success of sales calls</p> <p>13. The range of interactive Information and Communication Technology (ICT) equipment available to support effective sales activities</p> <p>14. Legal, regulatory and ethical issues relating to sales</p> <p>15. Organisation and sector regulatory requirements and practices relating to selling and customer transaction records</p> <p>16. The practices and activities of your competitors</p> <p>17. Your organisation's objectives and plans for telephone sales activities</p> <p>18. Organisational procedures for call action planning</p> |
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Knowledge and understanding

1. How to develop a call action plan and record the outcome of each call effectively
2. The sales cycle and how it helps you to structure and progress sales contacts
3. Techniques that can be used when selling face-to-face or on the telephone, including cross-selling and up-selling

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19. Organisational templates and proformas available for recording sales calls
20. Your organisation's products and services
21. Your organisation's customer base analysed segment by segment
22. Organisational policies, procedures and service offers that relate to products and services
23. Competitor activities, products and services and the latest developments in your organisation's markets
24. Sales targets for your own area of responsibility and limits of your personal authority
25. Organisational procedures for recording customer call information and follow-up activities
26. Who to keep informed about important customer call information
27. Organisational procedures for closing orders and securing sales, including organisational guidelines on after-sales agreements
28. Customer and prospect feedback activities and how to channel the information effectively
29. Your organisation's interactive technology requirements relating to sales activities
30. Available literature and support materials for the selling process
31. Support and technical assistance available to sales team members
32. Organisational methods for evaluating and measuring sales success