

## **FM64 04 (CFAMLF19) Sell Products/Services to Customers**

### **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](http://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.

### Evidence Requirements

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

The following table provides you with possible examples of evidence.

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### Evidence Requirements

PC	Evidence of Performance Criteria: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
	<b>Activities you have participated in and actions you have taken to sell products/services to customers</b>				
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					
PC12	♦ communications with customers (e-mails, letters etc.) after the sale has been closed	4, 5	3, 4, 6, 8	1	6
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	-		





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**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Internal verifier's signature** \_\_\_\_\_ **Date** \_\_\_\_\_