

CERTIFICATE IN SALES SKILLS

SENIOR SALES EXECUTIVE

AIM

The aim of this course is to provide a development opportunity for people with experience in a sales environment and with responsibility for account management & responsibility for other sales staff.

OBJECTIVES

This course will enable students to:

- Demonstrate an understanding of the detailed product, competitor and customer knowledge required for success
- Describe the range of internal and external relationships encountered
- Demonstrate an understanding of the principles of sales management
- Practice essential listening and professional telephone skills
- Implement work planning techniques including planning, implementation, monitoring and review
- Demonstrate the importance of understanding margins and factors which affect achievement of targets

CONTENTS

1. Building Competence

- Product knowledge
- Business Customer knowledge
- Company knowledge
- Competitor knowledge

2. Building Relationships

- Customer relationships
- Team member relationships
- Other internal relationships

3. Selling to Customers and Account Managers

- The selling cycle process
- The buying cycle process
- Developing and planning accounts and campaigns

4A Professional Telephone Skills

OR

4B professional Face to Face Contact Skills

5. Work organisation

- Planning
- Implementation
- Review
- Monitoring

6. Self-development and self-motivation

- Motivation to sell and meet targets
- Understanding margins and profitability
- Self-development
- Health & safety

Certificate in Sales Skills

Senior Sales Executive

**UNIT 1
BUILDING COMPETENCE**

Building Competence

Our customers buy from us for a variety of reasons, some more tangible than others. One of the criteria they will use to decide on a supplier will be the perceived competence of the person they are dealing with, either at the other end of the phone or face-to-face. For the purposes of this unit, competence is broken down into four areas:

- Product Knowledge
- Business Customer Knowledge
- Company Knowledge
- Competitor Knowledge

Product Knowledge

At senior level you will be expected to have extensive knowledge of the main vendors and suppliers of the products available through your company, and how these products differ from each other. Not only this, you will also be expected to know how the vendors and suppliers differ in areas such as pricing and discount structures, delivery terms and level of service to the end user.

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| <p>Certificate in Sales Skills</p> <p>Senior Sales Executive</p> | <p>ACTIVITY</p> |
| <p>QUESTION</p> | <p>RESPONSE</p> |
| <p>Where can you get information about vendors/suppliers and about new products coming onto the market?</p> | |

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| <p>How do you update your knowledge?</p> | |
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Discuss this with your team manager and explore whether there are other means of learning about the vendors you deal with and their products. If there are, add these to the list.

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| <p align="center">QUESTION</p> | <p align="center">RESPONSE</p> |
| <p>Choose a vendor or supplier you dealt with on the last large order you won.</p> <p>What did you learn about the vendor or supplier during the project?</p> <p>You could describe the vendor in terms of their product and pricing strategies, how easy it was to gain technical or business information, the typical queries</p> | |

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| <p>and issues you had to raise with them etc.</p> | |
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| QUESTION | RESPONSE |
| <p>How do you ensure that you retain and build on this learning from a particular project and vendor / supplier?</p> | |

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| <p>QUESTION</p> | <p>RESPONSE</p> |
| <p>How could you ensure that others, for example your team colleagues, share in this learning?</p> | |

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| <p>QUESTION</p> | <p>RESPONSE</p> |
| <p>Think about a customer who requested a product by a particular vendor for a large project. If this vendor's product was out of stock, not available quickly enough for the customer, or too expensive, for example, how would you go about finding an alternative vendor and product? How would you persuade the customer that the alternative was as good, if not better?</p> | |

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| QUESTION | RESPONSE |
| <p>How do you find out about, and then talk to the customer about products and services which could be linked to, and add value to, the product they are interested in?</p> <p>What might these products and services be?</p> | |

Business Customer Knowledge

The more you know about your customer and their business, the greater the chance that you can offer exactly what they are looking for, and be seen as a business partner rather than one of a list of suppliers.

Think about a project you have recently pitched for, where the outcome is not yet known. On the following two pages you will find tables to collate information on the customer. Fill in the two tables as fully as you can with the information you have to hand. Where you have no information, mark the box with a red dot or asterisk, to remind you to do something about it.

In **Table 1** you are asked to list your company's strengths and weaknesses as perceived by the prospective customer (the 'prospect'). If you are confident that you can deliver the project within the required time, but they are not convinced, for example, then that is a weakness in their perception.

In the lower half, think about any particular opportunities and threats that exist for you with respect to this piece of business. One opportunity might be, for example, that we have worked with them before, and they were happy with the outcome. A threat might be that a competitor has recently reduced their prices, or invited the prospect on an incentive weekend.

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In **Table 2** you need to fill in quite detailed information about the prospect's business, and about all the relationships you have within that business. The first line has been filled in with an example to help you. Wherever you have no information, or are not sure, put a dot or an asterisk in red, to remind you to do something about it.

Client _____ **Date** _____

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|----------------------|-------------------|
| Strengths | Weaknesses |
| Opportunities | Threats |

Table 1

Client _____ Date _____

| | Name & Title | Role | Buyer's Key Win Results | |
|---|------------------------------|----------------------------|---|--|
| | | | Personal | Business |
| 1 | John Adams Purchasing Mgr | Sourcing responsibility | Likes to feel he's getting a good deal | Will be measured on the price he can negotiate |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |

Table 2

Once you have filled in both tables, arrange a meeting with your team manager to go through the information. Add any details they may come up with, and set yourself an objective to fill in the gaps by a specified time. Arrange further meetings with the team manager to review this and give regular updates.

Table 2 in particular is intended to be a working document, not merely an output for this taskbook. You might find it helpful to fill out such a table for all your key accounts to highlight to yourself just how much you **don't** know about them and need to find out.

When dealing with your key accounts on a day-to-day basis, it is equally important to know as much as possible about your customer and their business. Things can change fast, and a loyal customer today can easily become someone else's tomorrow.

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| QUESTION | RESPONSE |
| <p>Which people or job functions, for example Purchasing Manager, do you deal with in your key accounts?</p> <p>Think about the following questions in relation to each type of customer.</p> <ol style="list-style-type: none"> 1. Why do they tend to contact you? 2. How often do they call you? How often do you call them? 3. What are their typical issues? 4. Have you met this person face to face? How often? 5. Who else are they talking to in the day - either within your company or in a competitor? 6. Why do they buy from your company (for example price, stock availability)? What might stop them buying from your company? | Customer 1 |
| | Customer 2 |
| | Customer 3 |
| | Customer 4 |
| | Customer 5 |

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It is not enough, however, just to know your customer inside out. As well as knowing about their business and their buying criteria, it is also essential to know about their customers' business and buying criteria as well.

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| QUESTION | RESPONSE |
| <p>Think about your top two accounts. How much do you know about their customers?</p> <ol style="list-style-type: none"> 1. Do they have an identifiable buying cycle? Do you know what this is? 2. What are their buying criteria (for example price, stock availability) 3. Why do they buy from them? What might change that? 4. What are their typical issues? | <p>Key Account 1</p> <hr/> <p>Key Account 2</p> |

Company Knowledge

As well as maintaining good contacts and networks with your customers within your accounts, it is also essential to know the key people internally that you need to deal with. Some of those people will be dependent on you for information, as well as the other way around, even though they are not necessarily dealing with the customers on a day-to-day basis.

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| QUESTION | RESPONSE |
| Think about all the people you need to work with internally. <ul style="list-style-type: none"> • Person or department: <p style="margin-left: 40px;">What do I need from them?</p> <p style="margin-left: 40px;">What do they need from me?</p> | |
| <ul style="list-style-type: none"> • Person or department: <p style="margin-left: 40px;">What do I need from them?</p> <p style="margin-left: 40px;">What do they need from me?</p> | |

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| <ul style="list-style-type: none">• Person or department: What do I need from them? What do they need from me? | |
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| <ul style="list-style-type: none"> • Person or department: What do I need from them? What do they need from me? | |
|--|--|

Competitor Knowledge

How much do you really know about the competition? However much you think you know about them, you can rest assured they are also trying to find out as much about your company as possible.

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|--|----------|
| QUESTION | RESPONSE |
| <ul style="list-style-type: none"> • Who is the competition? <ul style="list-style-type: none"> - Generally - For a specific product? | |

| | |
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| <p>Competitor 1:- Name</p> <ul style="list-style-type: none">• What do you know about their product range, pricing strategy,• What do your accounts buy from them?• Why?• When?• What would we have to do to get all their business?• What differentiates your company from the competition? | |
| <p>Competitor 2:- Name</p> <ul style="list-style-type: none">• What do you know about their product range, pricing strategy,• What do your accounts buy from them?• Why?• When?• What would we have to do to get all their business?• What differentiates your company from the competition? | |

Once you have answered these questions, arrange a meeting with your team manager to discuss your answers. Do you feel you need to know more about the competition? How could you find out any more about them?

Set yourself a personal objective to find out more about them within a certain timeframe, for example three weeks. Arrange a further meeting with your team manager to review the outcome.

Self Assessment

Check yourself against the Standards of Performance. Ask yourself:

Am I consistently achieving the standards in this unit? If the answer is 'yes' and you feel you are ready to be assessed, tick the appropriate column.

Yes No

I have extensive knowledge of our main vendors and suppliers

I know how our vendors and suppliers differ in pricing and discount structures

I learn, and build on learning about our products and services

I know how we can add value to the products and services we sell

I understand our organisation's strengths and weaknesses as perceived by our prospective customers

I know and play to our customers' buying criteria

I know my internal customers and partners within our organisation

I know who the competition is and how they differ from us

I know why accounts buy from us and why they buy from the competition

Now discuss with your team manager and complete the Assessment Record.

Assessment Record

The evidence recorded here is sufficient to confirm that the Student has achieved the standards in this unit.

Student's Signature

Date

Assessor's Signature

Date