

ASTSAL15

Prepare sales proposals and deliver sales presentations



Overview

This unit has been imported from the Marketing and Sales Standards Setting Body (MSSSB) Unit 15 (non-specialist suite)

What this unit is about

This unit is about preparing for sales opportunities, and includes developing proposals and sales quotations, and also the preparation of both formal and informal sales presentations. It includes identifying customer requirements, matching these with your organisations objectives and the features and benefits of your product/services, and presenting a planned sales pitch.

Who this unit is for

This unit is recommended for those involved in preparing proposals and in preparing and delivering sales presentations, but who 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.

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Performance criteria

- You must be able to:*
- P1 assess your customers needs and their interest in your organisations products/services
 - P2 ensure that your potential customers requirements are understood fully and that all issues requiring clarification are resolved before the proposal is finalised
 - P3 establish and develop the content of the proposal in your house-style, including essential information about the products/services offered, including the price, terms and conditions of sale
 - P4 provide the required level of detail, as briefed by your prospect or customer, and supply the proposal within the agreed time-scales, and follow it up with an appropriate offer of further clarification and information if that is needed
 - P5 agree with you customer the length and the content of the subsequent presentation and who will be present
 - P6 identify and evaluate the most suitable audiovisual aids for effective and innovative delivery of a presentation, and the promotional material that will most complement and enhance your presentation
 - P7 ensure that your presentation includes the benefits of your products/services, relating these to your customer s needs, and follows a format designed to attract your customers attention
 - P8 structure your presentation in a way that maximises the impact of the information and ideas within it
 - P9 ensure that any demonstration of products/services accompanying the sales presentation are prepared prior to the meeting
 - P10 anticipate problems, constraints or objections that could be raised in response to the presentation and prepare possible responses to them
 - P11 invite your audience to ask questions and to seek clarification, listening carefully to their questions, and responding positively and effectively
 - P12 aim to gain commitment to progress and, if possible, close the sale

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the content and structure of effective proposals, and the points which these need to address
- K2 how to keep the proposal customer focused
- K3 the range of resources and visual aids that can be used to assist in the presentation
- K4 the potential barriers that can exist in a presentation and how to overcome them
- K5 how to use verbal and non verbal communications effectively in presentations
- K6 how to show customers that you are listening to them and understand their needs and wants
- K7 how to read buyer signals, including verbal and non-verbal cues
- K8 the variety of questioning techniques that can be used to encourage and engage customers in the presentation

Industry/sector specific knowledge and understanding

You need to know and understand:

- K9 typical procurement practices in your industry

Context specific knowledge and understanding

You need to know and understand:

- K10 details of the products/services being offered by your organisation
- K11 your customer's requirements and how these relate to your products/services
- K12 your organisation's procedures for proposal development and submission
- K13 the information underpinning the submission of the proposal including factors relating to pricing strategies and payment arrangements
- K14 sales literature and promotional offers that are complementary to the presentation and will assist in securing the sale
- K15 testimonials from satisfied customers that can be used in your presentation

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Additional Information

Behaviours

1. You are alert to verbal and nonverbal communication signals and respond to them appropriately
2. You present ideas and arguments clearly, concisely and convincingly
3. You demonstrate a thorough knowledge and understanding of your organisation's products/services

Links to other NOS

Related specialist units

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB marketing units:

Sales units

1. Develop sales proposals and quotations
2. Develop and deliver a professional sales presentation
3. Undertake sales demonstrations

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Relevant occupations Managers and Proprietors in Hospitality and Leisure Services; Administration; Legal Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Administration and Secretarial Occupations; Government and Related Organisations; Business and Finance Associate Professionals; Managers in Farming, Horticulture, Forestry and Fishing

Suite Local Land Charges and Property Information 2009

Key words prepare, sales proposals, deliver sales presentations, quotations, customer requirements, identifying, product/services