

CFAM7.1.4

Assist in the development of sales support and customer management programmes



Overview

This is about how marketing/sales teams work together at all levels and with customers, both virtually and face-to-face, to ensure that they deliver high levels of marketing/sales and customer services support, through good administration and quality processes.

The delivery of excellent customer service involves working with others, communicating with others, consulting with others in order to meet the challenge of managing key customers effectively.

This unit will assist you in contributing to the development and implementation of customer management programmes and being a proactive marketing/sales team member aiding the successful delivery of sales support and customer management programmes

This unit is recommended for marketing/sales support team members, marketing/sales administrators and junior marketing/sales managers.

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Performance criteria

- You must be able to:*
- P1 contribute to the planning and preparation of sales support and customer services programmes providing constructive ideas and insights into the efficient and effective management of key customers
 - P2 ensure that everything is in place for managing key customers efficiently and effectively
 - P3 identify activities that you need to undertake to implement sales support and customer service programmes in your area of responsibility
 - P4 establish resource requirements directly related to your role and area in order to deliver excellent sales support and customer service to key customers
 - P5 with other sales team members either on a face-to-face or on a virtual basis, identify appropriate technology and software requirements for effective and proactive communication and response to customer needs
 - P6 establish internal/external stakeholder relationships with other business functions where there are strong links with service delivery, communicating and consulting with them on a proactive basis
 - P7 ensure consistent levels of service in responding to your key customers promptly and effectively and alert key members of the sales team of potential problems relating to sales support and customer service delivery
 - P8 make realistic promises and keep the commitments you have made to others
 - P9 ensure that you record and store customer service information accurately and in a way that it can be retrieved easily
 - P10 always supply accurate and up-to-date customer service information to key customers and marketing/sales personnel and select the most appropriate methods of communication, which is secure and reliable
 - P11 adhere to quality initiatives, processes and procedures and service level agreements as determined by the customer and the organisation
 - P12 monitor and evaluate the service you provide as an individual and particularly in team monitoring and evaluation reviews
 - P13 as a marketing/sales team member, take joint action with other team members to ensure that the level of service provided continues to meet customer expectations.

You must be able to:

Industry/sector specific knowledge and understanding

- P14 industry, organisational and professional codes of practice

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- P15 Legislation directly relating to the delivery of sales support and customer service – Health and Safety, Data Protection, Disability discrimination, Sales of Goods Act and the role of Trading Standards
- P16 competitor activities and major competitors of the organisation

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the concept of key customers and the benefits of key customers to organisations
- K2 the concept of relationship marketing and the principles underpinning it, of trust, commitment and co-operation
- K3 marketing/sales support, customer service and customer care, and how they add value to and key customer relationships
- K4 the role and scope of marketing/sales teams in delivering sales support and customer service and the importance of working with others
- K5 different types of quality programmes such as iso 9000, efqm and the importance of adhering to them
- K6 the development of service standards and how they are used as measures of performance
- K7 how to communicate effectively when dealing with key customers, in a clear, polite and confident manner
- K8 how to use information communication technologies, software and databases to manage customer relationships and information
- K9 industry standards, organisational and professional codes of practice in respect of the ways in which you deal with customers and manage customer information
- K10 the interaction and integration of other functional departments within organisations and the importance of internal communication and co-operation
- K11 the concepts of monitoring and evaluation and their importance in identifying continuous improvement

Industry/sector specific knowledge and understanding

- K12 industry, organisational and professional codes of practice
- K13 legislation directly relating to the delivery of sales support and customer service –Health and Safety, Data Protection, Disability discrimination, Sales of Goods Act and the role of Trading Standards
- K14 competitor activities and major competitors of the organisation

Context specific knowledge and understanding

- K15 those key customers with whom you will be involved in providing sales support and customer service
- K16 contractual arrangements organisational targets relevant to managing key customers
- K17 customer service level agreements and how they will be monitored and

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- evaluated
- K18 quality/process accreditations and procedures currently operational within the organisation
- K19 organisational structure relating to sales support and customer service teams
- K20 the limits of your own authority within your given role and when to seek permission or agreement from others to act
- K21 potential problems, barriers and limitations of customer accounts
- K22 communication platforms used to communicate with key stakeholders in key customer relationships
- K23 information communication technologies and software packages used to communicate with customers and store relevant information
- K24 how to store and retrieve information accordingly to the organisation's policy
- K25 the organisation's code of practice

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Additional Information

Behaviours

1. work as a marketing/sales team player in both a face-to-face and virtual environment and contribute to the sales support and customer service requirements of key customers
2. proactively respond to customer needs
3. contribute to the development and implementation of plans
4. develop an ethos of trust, commitment and co-operation with all stakeholders
5. demonstrate a sound awareness of the appropriate technology and software used to manage key customers
6. show professionalism, be ethical and demonstrate integrity at all times
7. articulate views and concerns in relation to the management of the key customer relationship
8. comply with quality and service standards employed by the organisation
9. show an awareness of legislation relating to the storing and usage of customer
10. adhere to health and safety requirements relating to your role and area of responsibility
11. communicate efficiently and effectively and be compliant with organisational practice
12. respond positively to customer criticism and take action to improve
13. self-monitor and evaluate your own personal performance and the impact it has on the implementation of excellent sales support and customer service
14. contribute to organisational success

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