

CFAMLF18

Prepare sales proposals and deliver sales presentations



Overview

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 organisation's objectives and the features and benefits of your product/ services, and presenting a planned sales pitch.

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.

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

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|-------------|-----|--|
| Sales units | 5.1 | Develop sales proposals and quotations, |
| | 5.3 | Develop and deliver a professional sales presentation, |
| | 6.4 | Undertake sales demonstrations. |

Details of these units can be accessed via www.cfa.uk.com

Note: This unit has been taken from the National Occupational Standards developed by the Marketing and Sales Standards Setting Body (MSSSB). The format of the unit is different to that used by the Management Standards Centre (MSC) for the units the MSC has developed.

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Performance criteria

- You must be able to:*
- P1 assess your customer's needs and their interest in your organisation's products/services
 - P2 ensure that your potential customer's 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, and 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 timescales, and follow it up with an appropriate offer of further clarification and information if that is needed
 - P5 agree with your customer the length and the content of the subsequent presentation and who will be present
 - P6 identify and evaluate the most suitable audio-visual 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 customer's 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

You need to know and understand:

Industry/sector specific knowledge and understanding

- K9 typical procurement practices in your industry

You need to know and understand:

Context specific knowledge and understanding

- 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 non-verbal 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

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