

## CFAS2.8

### Develop, implement and monitor sales call plans



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#### Overview

This unit is all about developing an effective sales call plan. An effective plan is one that enables sales team members to meet their personal sales targets. It also leads to the achievement of organisational turnover, profit and growth targets.

The unit is designed to ensure that you prepare call plans covering each individual customer. The plan ensures that customer needs are identified and opportunities for selling, up-selling, and cross-selling are fully exploited.

You will need to show professionalism and sensitivity towards your customers and your desire to meet customer needs at all times.

This unit is suitable for face-to-face selling, telesales and online selling

This unit is suitable for Sales Executives

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#### Performance criteria

*You must be able to:*

- P1 identify customers and prospects to contact by telephone, email or in person
- P2 determine the time available to deal with your prospective or existing customer in order to plan time effectively
- P3 prepare and assemble sales materials and sales angles that can be used during your contact with customers or prospects
- P4 identify personal sales targets appropriate to your customer base and access to prospects
- P5 seek to identify your customer's or prospect's current situation, needs and wants in relation to products and services, using a variety of effective questioning techniques
- P6 identify competitors with whom your prospect or customer has any connections
- P7 highlight your own organisation's strengths and use testimonials to demonstrate the benefits and features of your organisation's products and services
- P8 seek to show how your organisation's products and services can solve customer problems and add value and benefit to the customer experience
- P9 use questions to identify specific customer needs and wants
- P10 establish the strength of the prospect and their level of interest
- P11 identify actions that need to be taken to progress and close the sale
- P12 review the call to identify ways of improving your sales techniques

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#### Knowledge and understanding

*You need to know and understand:*

- K1 how to develop a call plan and record the outcome of each call effectively
- K2 the sales cycle and how it helps you to structure and progress sales contacts
- K3 techniques that can be used when selling face-to-face or on the telephone, including cross-selling and up-selling
- K4 methods for estimating maximum and minimum returns and how to prioritise calls according to the potential value and probability of a sale
- K5 listening and questioning techniques for selling or progressing a sale over the telephone
- K6 the difference between benefits and features and how to sell them effectively
- K7 how to involve your prospect in reaching a decision about the sale
- K8 methods for recording messages accurately and ensuring they are dealt with by relevant people promptly
- K9 the range of behaviours displayed by customers and how to manage them constructively
- K10 how to overcome customers' objectives sensitively, constructively and effectively when responding to their queries
- K11 effective methods for closing a sale
- K12 how to evaluate and measure the success of sales calls
- K13 the range of interactive information and communication technology (ICT) equipment available to support effective sales activities

#### **Sector specific knowledge and understanding**

- K14 legal, regulatory and ethical issues relating to sales, including the purchase and use of contact lists
- K15 organisation and sector regulatory requirements and practices relating to selling and customer transaction records
- K16 the practices and activities of your competitors

#### **Context specific knowledge and understanding**

- K17 your organisation's objectives and plans for telephone sales activities
- K18 organisational procedures for call planning
- K19 organisational templates and pro form as available for recording sales calls
- K20 your organisation's products and services
- K21 your organisation's customer base analysed segment by segment
- K22 organisational policies, procedures and service offers that relate to products and services
- K23 competitor activities, products and services and the latest developments

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- in your organisation's markets
- K24 sales targets for your own area of responsibility and limits of your personal authority
- K25 organisational procedures for recording customer call information and follow-up activities
- K26 who to keep informed about important customer call information
- K27 organisational procedures for closing orders and securing sales, including organisational guidelines on after-sales agreements
- K28 customer and prospect feedback activities and how to channel the information effectively
- K29 your organisation's interactive technology requirements relating to sales activities
- K30 available literature and support materials for the selling process
- K31 support and technical assistance available to sales team members
- K32 organisational methods for evaluating and measuring sales success

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#### Additional Information

##### Behaviours

1. you show respect for customers, understand and empathise with their views
2. you make contact to make an appointment ahead of a sales call where appropriate
3. you are honest, sincere and ethical in your sales approach
4. you are articulate and a good listener and you use appropriate verbal and non-verbal communication
5. you plan the use of time effectively
6. you work with other sales team members to avoid duplication and maximise sales opportunities

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**Developed by** CFA Business Skills @ Work

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**Relevant occupations**  
1132 Marketing and sales managers  
3542 Sales representatives  
7113 Telephone salespersons  
7129 Sales related occupations nec

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**Suite** Sales 2010

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