

## CFAS7.3

### Sell products or services over the telephone



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#### Overview

This unit is about identifying, developing and closing sales over the telephone from both inbound and outbound calls.

The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

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

This unit is for; Sales Executives and Sales Team Leaders

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#### Performance criteria

*You must be able to:*

- P1 identify your objectives for selling products and services over the telephone both by making and receiving calls
- P2 use call lists or leads provided by your organisation and prospect those most likely to produce sales
- P3 assess the potential of prospects and prioritise calls according to value and probability of closure
- P4 plan sales calls and identify how to obtain customer information and relaying key sales messages
- P5 use structured questions to obtain information from prospective customers about their needs
- P6 use structured questions to explain the major benefits of using key products or services and to demonstrate their compatibility with features and functions
- P7 explain the benefits and features of your products or services, interpret your prospect's reaction to those and decide how best to progress the sale
- P8 deal with customer queries and objections with clear and accurate responses
- P9 agree the basis of your customer's interest and their overall requirements
- P10 gain a commitment from your customer and close the sale
- P11 grasp opportunities to develop a positive relationship with customers and identify and pursue further customer contact
- P12 provide customer feedback and reaction to products or services to appropriate people in your own organisation

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#### Knowledge and understanding

*You need to know and understand:*

- K1 the sales cycle and how it helps sales team members to structure and progress their sales contacts
- K2 the differences between inbound and outbound telephone selling
- K3 the different situations in which telephone selling is appropriate and the advantages and disadvantages of selling by telephone
- K4 the differences between proactive and reactive selling
- K5 techniques that can be applied when selling on the telephone, including cross-selling, up-selling and selling add-ons
- K6 methods for assessing maximum and minimum potential and how to prioritise calls according to value and probability of closure
- K7 verbal, non-verbal, listening and questioning techniques suitable for selling over the telephone
- K8 how to operate your telephone system efficiently
- K9 the differences between benefits and features and how to sell them effectively
- K10 how to involve your prospect in developing and closing a sale
- K11 Methods for recording messages accurately and ensuring they are dealt with by relevant people promptly
- K12 the range of behaviours displayed by customers and how to manage them constructively
- K13 How to overcome customers' objections sensitively, constructively and effectively
- K14 effective methods for closing sales
- K15 how to evaluate and measure the success of telephone sales calls
- K16 the range of interactive ICT options available to support effective telephone sales activities

#### **Sector/Industry specific knowledge and understanding**

- K17 legal, regulatory and ethical constraints relating to telephone sales and the purchase and use of telephone contact lists
- K18 regulatory requirements relating to the completion of customer transaction documentation
- K19 competitive practices and activities

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

- K20 organisational objectives and plans for telephone sales contacts
- K21 the structure of your organisation and its products or services
- K22 organisational policies and procedures relating to your products or services
- K23 your organisation's target market and its significant features
- K24 competitor activities, products and services and latest developments in

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- your organisation's markets
- K25 sales targets for your own area of responsibility and the limits of your personal authority
- K26 processes for recording customer call information and follow-up activities
- K27 who to communicate with about important information relating to customer calls
- K28 your organisation's requirements for closing sales and securing orders
- K29 customer and prospect feedback activities and how to channel the information effectively
- K30 available literature and support materials for the selling process
- K31 who to go to, to secure effective sales support for customers

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#### Additional Information

##### Behaviours

1. you show respect for customers and understand and empathise with their views
2. you are honest, sincere and ethical in your telephone sales approach
3. you communicate articulately and listen actively
4. you adopt appropriate verbal and non-verbal communication options
5. you use the most effective questioning techniques for the sales situation
6. you adapt your behaviour to audience requirements
7. you work with other sales team members to avoid duplication and maximise sales opportunities

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**Originating organisation** Chartered Institute of Marketing

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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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**Key words** Sales, sales functions, sales strategy, selling

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