

CFAS9.5

Contribute to the development of sales support and customer management programmes



Overview

This unit focuses on how sales teams work together at all levels and with customers to ensure that they deliver high levels of sales and customer services support through good administrative and quality processes.

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

The unit covers how you contribute to the development and implementation of customer management programmes. It is also about you being a proactive sales team member contributing to the successful delivery of sales support and customer management programmes.

This unit is for; Sales Managers, Key Customer Managers and Senior Sales Managers

CFAS9.5

Contribute to the development of sales support and customer management programmes

Performance criteria

You must be able to:

- P1 contribute to the planning and preparation of a sales support and customer management programme
- P2 ensure that everything is in place for managing and providing consistent levels of service to key customers efficiently and effectively
- P3 identify activities that you need to undertake to implement a sales support and customer service programme 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 management
- P5 work with others to identify appropriate ICT support for effective and proactive two-way communication with customers
- P6 establish internal/external stakeholder relationships with other business functions where there are strong links with service delivery
- P7 make realistic promises and keep the commitments you have made to others
- P8 ensure that you record and store customer management information accurately and in a way that it can be easily retrieved
- P9 supply accurate and up to date customer management information to key customers and sales personnel
- P10 adhere to quality initiatives, processes and procedures and service level agreements as determined by your customer and your organisation
- P11 take joint action with other team members to ensure that the level of service provided continues to meet customer expectations
- P12 how to communicate effectively when dealing with key customers
- P13 how to use ICT to manage customer relationships and information
- P14 the interaction and integration of functional departments within organisations and the importance of internal communication and co-operation
- P15 the concepts of monitoring and evaluation and their importance in identifying continuous improvement

CFAS9.5

Contribute to the development of sales support and customer management programmes

Knowledge and understanding

You need to know and understand:

- K1 the concept of key customers and the benefits of key customers to organisations
- K2 the concept of customer relationship management and the principles of trust, commitment and co-operation that underpin it
- K3 sales support, customer service and customer care, and how they add value to key customer relationships
- K4 the role and scope of sales teams in delivering sales support and customer service and the importance of working with others
- K5 different types of accredited quality programmes 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
- K8 how to use ICT to manage customer relationships and information
- K9 the interaction and integration of functional departments within organisations and the importance of internal communication and co-operation
- K10 the concepts of monitoring and evaluation and their importance in identifying continuous improvement

Industry specific knowledge and understanding

- K11 industry standards and professional codes of practice relating to the way you deal with customers and manage customer information
- K12 legislation directly relating to the delivery of sales support and customer management
- K13 competitor activities in sales support and customer management

Context specific knowledge and understanding

- K14 who the key customers of your organisation are and which ones you will be involved with
- K15 contractual arrangements and organisational targets relating to managing key customers
- K16 service level agreements and how they will be monitored and evaluated
- K17 quality/process accreditations and procedures used by your organisation
- K18 organisational structure relating to sales support and customer service teams
- K19 the limits of your own authority within your given role and when to seek permission or agreement from others
- K20 potential problems, barriers and limitations of customer accounts

CFAS9.5

Contribute to the development of sales support and customer management programmes

- K21 communication platforms used to communicate with key stakeholders in key customer relationships
- K22 information communication technologies and software packages used to communicate with customers and store relevant information
- K23 how to store and retrieve information accordingly following organisational guidelines

CFAS9.5

Contribute to the development of sales support and customer management programmes

Additional Information

Behaviours

1. you proactively respond to customer needs
2. you contribute to the development and implementation of plans
3. you develop an ethos of trust, commitment and co-operation with all stakeholders
4. you demonstrate a sound awareness of the appropriate technology and software used to manage key customers
5. you show professionalism, are ethical and demonstrate integrity at all times
6. you articulate views and concerns in relation to the management of the key customer relationship
7. you comply with the quality and service standards of your organisation
8. you show an awareness of legislation relating to the storing and usage of customer information
9. you adhere to health and safety requirements relating to your role and area of responsibility
10. you communicate efficiently and effectively and follow organisational guidelines
11. you respond positively to customer criticism and take steps to improve

CFAS9.5

Contribute to the development of sales support and customer management programmes

Developed by CFA Business Skills @ Work

Version number 1

Date approved April 2010

Indicative review date April 2012

Validity Current

Status Original

Originating organisation Chartered Institute of Marketing

Original URN S9.5

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

Suite Sales 2010

Key words Sales, sales functions, sales strategy, selling