

CFAS9.6

Monitor and control relationship management activities



Overview

This unit is about the role of the sales team in monitoring and controlling customer relationships in order to maintain and continuously control the level of service offered. The unit also covers the initiation of change to products or services in response to the changing needs and expectations of key customers.

The focus of the unit is on identifying current methods of obtaining feedback and information to support monitor activities and ensuring feedback on customer service is actively sought and acted on.

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

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Performance criteria

You must be able to:

- P1 identify and evaluate the most effective methods of obtaining customer feedback
- P2 establish the qualitative and quantitative information you need from customer feedback
- P3 select the most appropriate methods of formal and informal feedback for monitoring of key customer activities
- P4 set up procedures and processes to support monitoring and control activities in agreement with key customers
- P5 identify key stakeholders in your organisation and in the key customer organisation to be involved in the monitoring process
- P6 establish ICT requirements for monitoring and feedback purposes
- P7 make use of all available regular reporting about key customer relationships and identify opportunities to improve that reporting
- P8 identify effective ways of communicating with others during monitoring and control activities
- P9 identify and evaluate key techniques to be used to analyse information obtained during monitoring and control
- P10 identify key strengths and weaknesses of the relationship and areas for improvement
- P11 establish key variances in customer feedback, identify reasons for them and consider the implications of them for the future of the key customer relationship
- P12 establish to whom the feedback should be communicated and recommendations made and ensure that the communication is effective

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Knowledge and understanding

You need to know and understand:

- K1 the concept of monitoring and control and why it is so critical to maintaining and enhancing key account relationships
- K2 various methods and processes for obtaining customer feedback
- K3 the differences between formal and informal ways of gaining feedback and how to use the information effectively
- K4 the types of qualitative and quantitative information required for monitoring and controlling purposes
- K5 the key stakeholders who typically should be involved in the monitoring and control process
- K6 effective ways of communicating and consulting others
- K7 available ICT systems available for collating and collecting customer feedback
- K8 different methods available for analysing formal and informal feedback
- K9 how to store and retrieve customer feedback information safely and easily
- K10 ways to provide analysed information and the various reporting techniques that can be used to provide formal feedback
- K11 how to motivate people involved in the process to be proactive and effective in monitoring and control activities
- K12 ways of influencing others to respond to customer feedback and improve levels of service

Industry/sector specific knowledge and understanding

- K13 legislation and regulation relating to customer account monitoring and feedback
- K14 issues relating to confidentiality of information
- K15 ethical issues associated with the collection of customer information
- K16 internal and external issues that could impact upon the type of information obtained

Context specific knowledge and understanding

- K17 account arrangements for key customer relationships
- K18 key objectives and targets relating to the performance of the key customer relationship
- K19 your organisation's requirements for monitoring and control activities
- K20 your organisation's practices relating to monitoring and controlling key customer activities
- K21 available technology, software and systems available for monitoring and control purposes
- K22 organisational report formats used for monitoring and controlling key customer activities

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- K23 your area of responsibility and limits of authority
- K24 current methods used for analysing and presenting customer feedback information for monitoring and control purposes
- K25 methods for managing sales support and customer service improvements
- K26 methods for dealing with variances in performance
- K27 approaches to continuous monitoring and control of sales activities in key customer relationships

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Additional Information

Behaviours

1. you articulate clearly the need for feedback as a mechanism for monitoring and controlling of key customer relationships
2. you work with others to establish the most appropriate methods of feedback for monitoring and controlling purposes
3. you work to overcome barriers to feedback and monitoring activities
4. you demonstrate flexibility and commitment to the monitoring and control process
5. you proactively seek informal feedback
6. you motivate others to participate fully in the monitoring process
7. you influence internal stakeholders to improve customer service as a result of monitoring and control activities
8. you communicate effectively and to the right stakeholders key information relevant to current and future developments
9. you act within your area of responsibility
10. you show integrity and are ethical at all times

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