
Overview

This standard is about preparing for despatch of products, or checking that services have been delivered, to customers. Key aspects of this standard include ensuring all the necessary documentation is completed as well as making sure that, before hand-over, the products and/or services are in the condition agreed with the customer at the time of the sale. The standard also includes ensuring that the products and/or services are confirmed as satisfactory by your customers and taking the opportunity to exploit further opportunities of cross-selling, up-selling or selling add-ons at the time of hand-over. This standard is for sales professionals who monitor the delivery of products and/or services.

**Performance
criteria**

- You must be able to:
- P1 check information on the order form to ensure it matches internal documentation and that products are available for despatch
 - P2 ensure that the products and/or services are prepared fully for hand-over to the customer in accordance with the terms and conditions of sale and organisational policy
 - P3 make changes to the order when necessary ensuring that it will satisfy customer expectations
 - P4 prepare documentation and records of hand-over, ensuring they are both accurate and complete
 - P5 record all necessary information accurately and completely
 - P6 ensure that the products and/or services are delivered to the customer in accordance with the sales agreement and terms and conditions of sale
 - P7 check that the customer is satisfied with the products and/or services
 - P8 deal with all customer problems and queries promptly and refer to somebody with appropriate authority if appropriate
 - P9 ensure all documentation for delivery and receipt by the customer is fully completed and accurate
 - P10 identify and follow up opportunities for up-selling, cross-selling and selling add-ons

Knowledge and understanding

You need to know and understand:

- K1 legal and regulatory requirements affecting the despatch and hand-over or delivery of products and/or services
- K2 Industry standards and practices relating to the despatch and hand-over of products or delivery of services
- K3 organisational procedures relating to the despatch and hand over of products or delivery of services
- K4 organisational terms and conditions of sale
- K5 the role of the sales person in the delivery of products and/or services to customers
- K6 the concept of transfer of ownership
- K7 the concept of hand-over of products and/or services to customers
- K8 the purpose of maintaining records of hand-over or delivery preparations
- K9 how to deal with customer problems and queries
- K10 how further sales opportunities can be identified and maximised
- K11 the concepts of up-selling, cross-selling and selling add-ons

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Relevant occupations	Marketing and sales managers; Business sales executives; Sales accounts and business development managers; Telephone salespersons; Sales related occupations
Suite	Sales (2013)
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