
Overview

The purpose of this standard is to provide a basis for building and maintaining effective sales relationships. The standard is designed to enable you to build a strong relationship with your customer and understand your customer's needs and expectations more clearly by working in partnership with them. This standard is also about maintaining sales relationships through building relationships based upon trust, commitment and co-operation designed to achieve long-term customer loyalty. This standard is for sales professionals.

**Performance
criteria**

- You must be able to:
- P1 identify customers with whom to build effective sales relationships and prioritise an approach to them
 - P2 establish existing and potential customer needs and expectations and balance them with the organisation's sales strategy
 - P3 agree with the customer the basis on which the relationship should operate and be maintained and develop a customer relationship plan
 - P4 ensure that the product service offer is clearly defined in terms of customer needs and expectations
 - P5 build a rapport with the customer
 - P6 negotiate with the customers a range of mutually beneficial sales solutions
 - P7 identify opportunities to develop the relationship with the customer
 - P8 identify and follow up appropriate opportunities for up-selling, cross-selling and selling add-ons
 - P9 seek and collect customer feedback about the organisation's provision of products and/or services
 - P10 use feedback to ensure that the quality and consistency of service is being maintained
 - P11 deal with customer complaints or problems and provide suitable sales solutions
 - P12 ensure regular feedback is given to colleagues on the status of the relationship
 - P13 monitor and evaluate the relationship on a regular basis

Knowledge and understanding**You need to know and understand:**

- K1 legal, ethical, political, technical, environmental and corporate social responsibility requirements for customer relationships
- K2 quality and compliance issues
- K3 methods of customer relationship management
- K4 organisational criteria for establishing customer relationships
- K5 the focus of the sales strategy, sales activity plans, sales targets and sales objectives
- K6 how to identify and prioritise effectively customers with whom the organisation should be building long-term and profitable relationships
- K7 the nature and scope of the relationship and its long term value and potential to the organisation
- K8 the content of a customer relationship plan and the information on which this is based
- K9 the interpersonal skills required to establish relationships and build rapport with customers
- K10 how to assess the risk and potential benefits of the relationship
- K11 how to communicate with key customers effectively in order to develop trust, commitment and co-operation
- K12 how to negotiate effectively with customers to establish a mutually beneficial financial outcome from the relationship
- K13 the concepts of up-selling, cross-selling and selling add-ons and when it is appropriate to do this
- K14 methods for monitoring and evaluating customer relationships
- K15 how to establish the level of resource required to manage a customer relationship effectively
- K16 ways to identify and grasp sales opportunities when maintaining a customer relationship.

CFASAL024
Build and retain effective sales relationships



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