CATERING AND TOURISM TRAINING INSTITUTE

Sector: - Culture, Sports and Tourism

Sub Sector: - Hotel and Hospitality

Hotel Management Level – VI

Learning Guide #1

Unit of Competency: Plan and Implement Sales Activities

Module Title: Planning and Implementing Sales Activities

LG Code: CST HLS4 M08 LO1-5

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Addis Ababa, Ethiopia

INSTRUCTION SHEET	**LEARNING GUIDE 1**

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics –

- Plan sales activities.
- Prepare for sales calls.
- Make sales calls
- Review and report on sales activities.

This guide will also assist you to attain the learning outcome stated in the cover page. Specifically, upon completion of this Learning Guide, you will be able to –

- Plan sales activities. according to the standard
- Prepare for sales calls. according to the procedure & standards
- Make sales calls according to the procedure & standards
- Review and report on sales activities according to the procedure & standards

Learning Instruction

1. Read the specific objectives of this Learning Guide.
2. Read the information written in the "Information Sheet 1" in 1-5pages.
3. Accomplish the "Self-check" in page 5
4. Submit your accomplished Self-check. This will form part of your training portfolio.
5. If you earned a satisfactory evaluation proceed to "Information Sheet 2"in page 6 However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity #1.
6. Read the information written in the "Information Sheets 2" in page 6-17.
7. Accomplish the "Self-check 2" in page 18
8. Submit your accomplished Self-check. This will form part of your training portfolio
9. If you earned a satisfactory evaluation proceed to "Information Sheet 3". However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity
10. Read the information written in the "Information Sheets 3" in page 19-21.
11. Accomplish the "Self-check 3 " in page 22.

12. Submit your accomplished Self-check. This will form part of your training portfolio
13. If you earned a satisfactory evaluation proceed to "Information Sheet 4". However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity
14. Read the information written in the "Information Sheets 4" in page 23-38.
15. Accomplish the "Self-check 4" in page 39.
16. Submit your accomplished Self-check. This will form part of your training portfolio
17. If you earned a satisfactory evaluation proceed to "Information Sheet 5". However, if your rating is unsatisfactory, see your teacher for further instructions or go back to Learning Activity
18. Read the information written in the "Information Sheets 5" in page 40-50.
19. Accomplish the "Self-check 5" in page 51.
20. Submit your accomplished Self-check. This will form part of your training portfolio

INFORMATION SHEET-1	LO1 IDENTIFY THE CONTEXT FOR SALES ACTIVITIES

1.1 Describe the sales objectives of relevant internal documents

Introduction

Planning of sales effort is one of the most important tasks a sales manager or staff member needs to undertake, as how the sales team perform ultimately will depend on how the manager:

- ✓ Allocate accounts or geographical areas to members of the sales team identifying sales objectives
- ✓ Set sales targets
- ✓ Establish sales procedures for the sales team to follow
- ✓ Set guidelines to allow flexibility and decision-making by the sales team
- ✓ Determine the key performance indicators to evaluate sales performance.

The objective of planning sales effort is to allow the sales staff to carry out the sales process in an easy and profitable manner for the organisation; and it is the duty of the manager to create this plan and ensure that it is well documented.

Allocating accounts / geographical areas

Depending on your organisation, your customers could vary from small firms to multi-national companies. Your organisation may be selling more than one product or service, and sales effort may also include selling to global accounts.

Hence, there are numerous ways you can allocate or assign customers and accounts to members of your sales team. That said you must ensure that all customers and accounts are assigned to specific sales staff who are capable of handling them adequately.

Determining who sells to who may be done through assignment by:

- ➢ ***Geographical areas*** - such as by postal code (local accounts) or by region of the country (global accounts)
- ➢ ***Products or services*** - if your organisation sells more than one product or service, such as different sales staff selling Europe tours and China tours
- ➢ ***Industry*** - selling to different types of customers such as to banks, insurance companies and schools.

Take note that when allocating accounts or geographical areas to sales staff, you need to take into consideration the relative ability of the sales staff in terms of product knowledge, market knowledge, past sales performance, communication and selling skills.

Identify sales objectives

It is important to establish sales objectives from the start. These are essential as they will guide sales planning and any associated activities.

Sales objectives may be related to:

- Market share
- Turnover
- Profit
- Units sold
- Percentage growth
- Ratio of enquiries converted to sales
- Number of sales-related enquiries received
- Specific products and/or services
- Nominated periods of the year including seasonal, events, holidays, peak seasons and low seasons.

Setting sales targets

Another important task that must be carried out by the manager when planning sales effort is the setting of sales targets. Sales targets are important, as they can be used for:

- Measuring and controlling sales performance
- Motivating sales staff by linking the sales targets to compensation plans
- Identifying the strengths and weaknesses of the company

There are many ways to set targets for sales staff in the hospitality industry. Besides sales volume, sales targets may also take the form of acquisition of new customers who have never experienced your organization's brand, product or service, or even up-selling to existing customers.

Sales targets may be set on a short-term or long-term basis, depending on your Organization's policy and requirements.

- Short-term targets refer to targets that have to be achieved quarterly or yearly.
- Long-term targets are those that are achieved over a span of a few years - such as three years.

Involve your sales team

Sales teams are the people who are the most familiar with your organization's products and Services, and how they perform in the market.

Hence, it makes practical sense to involve your sales staff when reviewing sales and setting sales targets. Moreover, studies have found that the more involved your sales team is in setting sales targets, the keener they are to achieve them.

Sales targets must be 'SMART'.

Sales targets are not meaningful if they are not specific, measurable, attainable, realistic and time-bound. Some examples of sales targets are:

- Acquire X number of new customers / accounts who have never experienced your organization's brand or products / services every quarter
- Up-sell to Y number of existing customers / accounts every quarter
- Achieve 95% occupancy rate for the next 12 months.

To set 'SMART' sales targets for your sales team, you will need to:

a. Review past sales figures
b. Forecast the sales for your organization's products / services
c. Discuss with your sales team.

1.2 Identify relevant organizational policies and procedures

Sales procedures spell out the sequence of activities that your sales staff need to perform, and they are established to help sales staff perform effectively. For example, your organisation may require the sales staff to meet with the customer face- to-face to explain the features and benefits of the products and services before closing the sale. It may also require sales staff to follow-up with customers to provide after-sale service.

However, some organizations feel that sales staff should be given more freedom to schedule his/ her own tasks and perform according to his/her own convenience. They believe that jobs with higher autonomy create a greater sense of responsibility and job satisfaction for employees. But studies have found that increased autonomy often leads to less control over sales staff's work and difficulties in monitoring their performance.

Sales procedures, if any, need to be established at the onset. Establishing sales procedures is an integral part of a manager's effort in planning sales.

Types of organizational sales policies and procedures

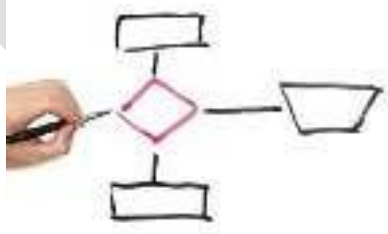
Organizational sales policies and procedures may include:

- Approved selling approaches and techniques
- Recommended techniques for approaching and closing a sale
- Allowable types and styles of advertising campaigns
- Specified target markets including niche markets
- Media to be used for advertising
- Promotional approaches that are allowed
- Public relations initiatives approved and/or authorized
- Scopes of authority for making sales-related decisions
- Price-related issues relating to allowable discounts, concessions, free-of-charge products and services, loyalty schemes, and all other factors that have the capacity to impact on selling price and profit.

Set guidelines for flexibility and decision-making

Sales guidelines are also necessary to provide sales staff with some flexibility to make their own decisions on matters such as:

- Amount of discounts to grant to customers
- Credit terms to extend to customers
- Refunding a sale.



With these guidelines in place, the sales staff will be able to deal with customers or their requests more effectively, since their limits of authority is clearly established through these guidelines in terms of what actions can or cannot be performed.

1.3 Determine the key performance indicators to evaluate sales performance

Key performance indicators (KPI's) spell out how the sales team and individuals within the team will determine the success of sales planning and performance. They set out the criteria that will be used to judge success and identify the dates and times when such as evaluation will occur.

Types of key performance indicators

Key performance indicators will include:

- Sales objectives (as mentioned previously)
- The impact that increased sales may have had on service levels and customer satisfaction levels

- ❖ Consideration of the intangible elements that are central to the operation and reputation of the business
- ❖ Relevant timelines and milestones
- ❖ Return in investment of monies spent on sales activities
- ❖ Relevant success rates for direct selling activities, media campaigns, public relations exercises, and other nominated promotional sales activities
- ❖ The contribution made by joint venture arrangements and agency affiliations, including consideration of the costs associated with such agreements.

Self-Check 1	**Written Test**

Name: ___________________________ Date: ________________

Directions: Answer all the questions listed below. Illustrations may be necessary to aid some explanations/answers.

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

1.1 To fulfil the requirements of this Work Project you are asked to:
- ✓ Identify how you can allocate accounts based on geographical areas
- ✓ Identify five sales objectives, stated in a SMART format.

1.2 To fulfil the requirements of this Work Project you are asked to:
- ✓ Identify four sales policies and procedures you would have to guide sales activities.

1.3 To fulfil the requirements of this Work Project you are asked to:
- ✓ Identify five key performance indicators.

INFORMATION SHEET-2	LO2 PLAN SALES ACTIVITIES

2.1Plan and schedule sales activities for existing and potential customers in accordance with relevant internal documents and/or system

When deciding on a sales strategy for an organisation it is important to ensure that all relevant information is at hand, accurate and evaluated. As the old saying goes 'information is power'. The more information you have at your disposal, the more accurate judgements can be made in relation to choosing the best sales approach for the benefit of both the customer and the organisation.

Relevant organizational documents

There are many types of organizational document and information that can help decide sales strategies. One important aspect of selling, is identifying and utilizing documents that can help improve understanding of the sales strategy, current operations and customer profile information.

Relevant documents that can help identify different types of sales information should include:

- Business plans
- Strategic plans
- Marketing plans
- Departmental operational plans
- Budget reports and financial statements, including consideration of revenue, cash flow, costs, profits
- Reviews of previous marketing and sales-related activities
- Customer feedback.

Organizational information

Whilst there are endless pieces of organizational information that can help facilitate the sales planning process, this section will focus on information that is sales oriented.

Marketing objectives, strategies, tactics

Given that the sales process is a direct result of marketing initiatives it is important that these are reviewed. A marketing strategy normally details:

- Product/service/brand strategies
- New products/services strategy
- Pricing strategies
- Placement, logistics and distribution of services strategies
- Promotional strategies – marketing communications strategy

- Media advertising and public relations strategy
- Sales promotions strategy
- Direct marketing tools and technology
- Personal selling and sales management strategy
- Positioning strategies
- People and processes – customer relationships and service delivery.

Sales policies

Coordinating sales performance requires everyone to implement the sales policies and procedures of the organisation. Inherent in these selling activities is the effective application of product knowledge to the selling of products and services, demonstration of items and knowledge about the organization's sales policy. Important to this orientation is a sales approach that is not a 'sell at any costs' situation. Specific sales policies may address issues relating to selling, such as:

Meeting and greeting the customer –setting out the style of verbal greeting and even recommended body language. It may set out the timeframe within staff must make contact with customers – this can cover the nature of questions and communications designed to create a positive environment, as well as identify customer wants, needs and preferences

Selling techniques – covering aspects such as presenting items, use of product knowledge, demonstration of items (including guided tastings) and comparisons between suitable options (on the basis of price, quality, availability, supplier and other product specific criteria)

Meeting buying objections – convincing customers to buy despite their stated and implied opposition and doubts so that the sale is moved to a successful win-win close.

Identification of selling and promotional techniques, strategies, promotions and approaches that have been identified by the store as being forbidden under all, or nominated circumstances

Identification of incentives that may be used by sales assistants to encourage and obtain sales, together with incentives that are considered inappropriate and unacceptable

Definition of persons to whom the store will not promote or make sales – this may include minors where sale or supply is legally required to be only to persons above a stated age (in the case of certain products such as cigarettes and liquor) or persons who have made specific applications to the store requesting that they be barred or otherwise not served, or have credit extended to them

Explanation of requirements the conduct of sales staff must be in accord with – this relates to nominated service standards, community standards and ethical considerations such as honesty and full disclosure together with an absence of pressure, coercion and misrepresentation, and the need for all promotions and sales efforts to be of good taste and to not be offensive

Classification of individual sales staff roles, responsibilities and limits and extents of authority – in relation to aspects such as calculating discounts, resolving customer problems, complaints and issues, approving advertising, advising customers and sales personnel in specialist areas.

2.2 Identify, analyze and incorporate appropriate host enterprise, customer and market information to be included into the sales planning process

Besides internal documents and information mentioned in the previous sections, there are various types of information that can help facilitate the sales planning process includes that relating to:

- ❖ General sales information
- ❖ Customers
- ❖ The market in general.

General sales information

Information to be included into the sales planning process should relate to:

- ✓ Sales and marketing reports
- ✓ Financial statistics
- ✓ Market trends
- ✓ Competitive activity
- ✓ Consideration of new and/or revised products and services
- ✓ State of the economy.

Customer information

This information describes your target markets in as much detail as possible. They can be grouped into segments. The information included is based on:

- ✓ Demographics
- ✓ Geographies
- ✓ Psychographics characteristics
- ✓ Socioeconomic characteristics.

Market information

General market information

- ✓ External environmental analysis
- ✓ Swot including opportunity and issue analysis.

Environmental trends

- ✓ General economic conditions
- ✓ Demographic factors
- ✓ Cultural factors
- ✓ Technological factors impacting on your business.
- ✓ The attitudes and policies of political and regulatory bodies.

Competitors

Identify one direct competitor and one indirect competitor and compile the following information about them

- ✓ Name and address
- ✓ Scale of operation, number of staff
- ✓ Age of competitor
- ✓ Current strengths and weaknesses

2.3 Source prospects and create prospect profiles

One of the most important aspects of sales planning is to build a customer base in which to aim sales initiatives towards. Whilst an organisation will have an established base of existing customers some key aims of a sales initiative is to ensure:

- ✓ The existing customer base is appropriate If so, how to expand this base
- ✓ Explore ways to get them to spend more money or increase repeat business
- ✓ If the current customer base is not appropriate, identify other market segments in which to aim sales initiatives.

Sourcing customer prospects

Source new customer prospects may include, but certainly not limited to:

- Proactively seeking out prospective customers
- Reviewing the buying history of previous customers
- Asking existing customers for referrals.

Creating customer profiles

Obtaining information about current customer segments is vital in ensuring that we understand the key preferences and purchasing influencing factors they may have. Ways to create customer profiles include:

- Using internet websites to capture prospects information
- Conducting an in-house or external activity/competition to capture information about prospective customers
- Generating files for potential customers, including indication of identified demographic characteristics deemed necessary by the organisation to support successful sales activities.

2.4 Estimate potential revenue based on analysis of information captured in consultation with appropriate colleagues

Most business planning is based around creating and increasing revenue and profit margins. This is also true when it comes to sales planning. An important part of sales planning is trying to determine potential revenue that can be generated by different sales initiatives. In earlier sections, the identification of sales objectives, targets and KPI's were a key driving force in which sale initiatives and performances were to strive to achieve. In many cases these sales objectives, targets and KPI's will be revenue or profit based.

Types of appropriate colleagues

Before we explore the different ways to estimate potential revenue, it is important to recognize that many colleagues can help provide helpful information and insight into expected business activity, demand and projected revenues. Appropriate colleagues may include:

- Supervisors, managers and owners
- Accounts department
- Sales and marketing department
- Frontline sales staff
- Any customer contact staff
- External marketing consultants

- Representatives from head office and other organisations with which the business has an appropriate commercial arrangement.

Techniques to estimate potential revenue

Each organisation will have their own sources of information and techniques they will use to estimate potential revenue. Some of these methods and techniques include, but not limited to:

- Using various modelling techniques
- Addressing a variety of price points for sales
- Calculating the possible increase in sales as a result of:
  - ✓ Selling price reductions
  - ✓ Packages and specials
  - ✓ Time-limited offers
  - ✓ Offers made only to a selected band of customers
  - ✓ Increasing prices
  - ✓ Value-adding to existing products and services
  - ✓ Viable changes to the '4Ps of marketing' (Price, Place, Product, Promotion)
  - ✓ Undertaking focused market research on spending patterns of target markets and the changes in these patterns in response to nominated sales activities.

Yield Management Principles

To optimize sales, many organizations today, particularly those in the hospitality industry are practicing revenue (yield) management to help reach their goals. With the help of sophisticated software's, managers are now able to use price, reservation pattern and overbooking practices to manage demand and supply (capacity) effectively to achieve maximum sales.

Revenue management is a methodological approach to allocate capacity to the most profitable customers, and it is an extremely useful tool for selling perishable goods or services that cannot be stored.

So how does revenue management work?

Basically, revenue management sets prices according to forecasted demand for the various market segments. The least price-sensitive segment will be allocated capacity at the highest price, followed by the next segment at a lower price. As the least price-sensitive customers often book closer to the time of actual consumption, a challenge in revenue management is to be able to keep the allocated capacity free for this group of customers and risk not selling them at all.

However, a good revenue management system should be able to predict capacity allocation to each target group of customers with reasonable accuracy.

Take note that despite its effectiveness in optimizing sales, the use of revenue management can be very complex, as it requires good understanding of customers' demands and the ability to forecast these demands accurately.

Forecasting demand

Forecasting demand refers to predicting future demand by anticipating what customers are likely to buy under a given set of conditions. Let us look at an example to understand the importance of forecasting demand.

The Travel Association of America will be hosting the annual world travel summit this year, and it requires 100 rooms for three nights to accommodate the delegates from overseas. It approaches Y Hotel to offer S$95 per room per night. Y Hotel sells its rooms at the following rates:

a) Rack rate - $150
b) Corporate rate - $125
c) On-line booking - $105.

As a manager, would you accept the 300 room-nights at the lower rate, or would you turn down the request? Without demand forecasts, you will not be able to make any wise decision as to whether to accept or forgo this business worth $28,500.

Hence, if done correctly, demand forecasts can actually help us optimize sales and maximize profits. Forecasting demand, we need to bear in mind the factors that will affect the future demand of our products and services. Such factors may include seasonality or special events.

Time series analysis

By analyzing past sales over time to identify trend, cycle, season and erratic occurrence, we are able to produce a realistic and reasonably accurate forecast of our sales for the next period.

Trend

Allows us to identify the long-term pattern of growth or decline in sales over time.

Cycle
Captures medium-term variations in sales caused by factors such as competition or economic instability.

Season
Helps us to establish consistent patterns of weekly, monthly or quarterly sales within the year. Seasonal patterns may be the result of factors such as festive holidays or monsoon seasons.

Erratic events
Generally refer to acts of God, and may include events such as fire, flood, earthquakes, tsunamis, riots or strikes.

These events are unpredictable and cannot be forecasted accurately. They generally do not occur in the local context to affect sales significantly. But should they really occur, they must be removed from past data so as to reveal a more normal behavior of sales.

Thus, with past data on sales and demand patterns, we are able to forecast the demand activity for our products / services, which may include:

- ❖ Estimating demand on a daily or weekly basis.
- ❖ Predicting cancellations and no-shows.
- ❖ Estimating demand for:
    - ✓ Different customer segments, such as business and leisure travelers
    - ✓ Promotional activities and events
    - ✓ Seasonal periods, such as Christmas or school holidays.

2.5 Plan activities to maximize opportunities to meet required sales performance targets

There are many activities that can be used to maximize sales opportunities in reaching desired targets. Some of these activities may be direct sales promotions or initiatives or can also include activities designed to develop staff involving in the selling process.

Whilst each organisation will have their own activities specific to their sales plans and the products and services they are trying to sell, this section will focus on some generic activities that can be implemented to help ensure the sales strategy can be as effective and successful as possible.

Identify targets

These are designed to guide sales activities and to evaluate sales performance. Commonly the targets will be set in dollars (for sales), or 'units sold' but they may also cover areas such as:

i. **Profit** – such as percentage mark-up or percentage cost factor (cost of goods sold), Number of people served, Customer satisfaction levels
ii. **Product quality issues** – which may specify the factors that are of importance to the store such as, for example, taste, portion size, appearance, serve size, temperature, aroma
iii. **Value –** identifying customer perceptions about the value-for-money they believe our products represent
iv. **Speed of service** – quantifying issues such as waiting times for obtaining customer service advice, point of sale transactions and other service points such as handling complaints, dealing with refunds and exchanges, paying accounts
v. **Complaints and compliments** – quantifying the number of complaints and compliments received, and breaking these down into nominated categories such as 'customer service', 'products', 'price' and 'facilities'

Provide training to improve selling skills

Many organizations merely hire sales staff and just send them out to procure business. They do not have a proper sales development plan in place to help their sales staff excel and exceed targets. To achieve sales growth, you need to support your sales team with appropriate sales training and coaching to maximize their potential. Helping them pave their way to greater success will increase their motivation, which in turn will lead to increased sales activities and hence business growth.

You would have gathered by now that effective sales people are essential for organizations to remain in business. However, there is no such thing as a born salesman. The key to developing an effective sales team is thus to provide them with relevant training to improve their selling skills. When providing training for your sales staff, you need to first determine the key knowledge, skills and attitude that your team needs to be successful in their sales.

Focus on topics that will help improve their selling skills. Providing training for sales staff can be challenging, especially when they are very experienced. Such staff tend to feel that they do not need the training and that it is an utter waste of their time.

Hence, when providing training for your sales staff, it is important to spend some time changing their mindset to let them see the value of sales skills training. This may be done through sharing of success stories.

Sales training considerations

Some considerations to bear in mind when providing sales skills training are:

Make everyone committed to the training programme. Set aside time for the training and make it mandatory for all sales staff to attend. Highlight to them the importance and benefits of attending the training

Insist everyone participates actively and shares his/her experiences and views during discussion and group activities. Creating an environment that promotes sharing and learning from peers is important for the sales team to work together to discover for themselves what works and what does not

Role play to enhance learning effectiveness. Video recording the role plays and playing back for critique and feedback is an extremely powerful tool for your sales staff to reflect and identify their own strengths and weaknesses, as well as areas of improvements required.

Take note that selling skills do not refer to sales techniques only. Selling skills may also include product knowledge, communication skills and any other knowledge or skills required by sales people to perform their jobs effectively. Other than product knowledge, you do not have to deliver the sales training personally. An external expert sales trainer may be engaged to conduct the training for your sales team

Provide coaching

As a manager, you also need to know when to advice and coach your sales staff. Coaching can be structured or undertaken on ad hoc basis. But to optimize sales, it is important that you make some effort to understand your sales staff and set aside time to coach them personally on a regular basis.

Provide necessary support

Sales optimization cannot be attained with just the sales team having the right professional skills. Support in many other areas is necessary to aid them towards achieving their goals. To ensure optimised sales, you may need to provide the following support to your sales team.

- ❖ Provide all required resources for the sales staff to carry out the sales function more efficiently, and this may include technology and internal processes and procedures
- ❖ Create a platform for sales staff to share successes and best practices. Getting them to share positive results and the specific actions taken to achieve the outcome can help improve the competence of weaker staff, as well as create some friendly competition among sales staff to out-perform one another

- ❖ Devise and implement a cost-effective marketing plan to reach out to the target markets. Marketing support is important as marketing efforts not only support direct sales efforts, they also allow your products / services to reach other market segments that may not be solicited through direct sales

- ❖ Maintain proper records of all interactions and communications with customers or potential leads, and make these information easily accessible to all sales staff.

Implementing appropriate compensation plan

Compensation has direct and great impact on sales optimization, although it is unlikely that we can resolve sales performance issues by merely adjusting compensation plan. For compensation plan to be effective in driving sales performance, we need to ensure that the pay, commission, bonus, reward and recognition structures are able to motivate the sales team to bring in additional sales.

To optimize sales, we need to re-examine our existing compensation plan to establish and implement a more appropriate one that can drive performance.

Identify selling situations

In terms of sales, selling situations may involve any or all of the following:

- ✓ Face-to-face, one-to-one sales situations – which may be the most common
- ✓ Face-to-face, group sales situations – where 'a group' is more than one person and may include a family, a couple, two friends, or a club or other special interest group
- ✓ Telephone sales – which may embrace incoming sales-related calls (customers seeking advice and information), may include sales staff applying telemarketing techniques to canvass prospects, or may require you to follow up a query or call for help Sales advice and requests made via the fax machine
- ✓ Internet sales
- ✓ Referral business – where a person you know identifies a prospect who may be interested in your products or services; some establishments pursue this option and other premises do not.

Identify sales related activities

Activities to maximize opportunities to meet required sales performance targets may include:

- ✓ Advertising
- ✓ Promotions
- ✓ Joint promotions
- ✓ Entering into new markets
- ✓ Public relations
- ✓ Direct selling
- ✓ Adding new products and services to the sales menu
- ✓ Consideration of individual activities and team/departmental activities.

2.6 Establish practical sales call patterns based on analysis of all relevant customer and market information

Once sales strategies and approaches have been determined it is now time to identify the timing of sales initiatives to ensure they are conducted at appropriate times and in effective intervals. This section will explore the importance of identifying sales call patterns in order to reach customers at a time which will likely result in a sale.

Impacts on sales call patterns

Before identifying sales patterns, it is important to understand factors which may impact on the ability to make sales calls or the effectiveness of the calls themselves. Sales call patterns may be affected by:

- ✓ Specific sales and revenue targets
- ✓ Call intensity required
- ✓ Geographic considerations and restraints
- ✓ Current organisation priorities
- ✓ Need for administration and reporting time.

Activities to establish sales call patterns

Whilst there are many activities associated with making sales calls, these may include:

- Identifying hot and cold prospects
- Sharing the calls equitably amongst sales staff
- Allocating the most relevant sales personnel to nominated prospects
- Scheduling calls
- Placing appropriate staff on roster
- Determining or clarifying sales and revenue targets
- Determining level of call intensity required
- Considering relevant geographic constraints and factors
- Aligning with current host enterprise priorities
- Accommodating the needs for administration activities and reporting functions.

Self-Check 2	Written Test
Name: ______________________	Date: ______________

Directions: Answer all the questions listed below. Illustrations may be necessary to aid some explanations/answers.

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 To fulfil the requirements of this Work Project you are asked to research and identify: Three relevant organizational documents that could be used to help plan sales activities, detailing:

- ✓ Purpose of the document
- ✓ Main aspects of the document.

2.2 To fulfil the requirements of this Work Project you are asked to research and identify three examples of the following information that could be used to help plan sales activities:

- ✓ General sales information
- ✓ Customer information
- ✓ Market information.

2.3 To fulfil the requirements of this Work Project you are asked to:

- ✓ Identify four ways you can source customer prospects.

2.4 To fulfil the requirements of this Work Project you are asked to:

- ✓ Explain how you can forecast demand for a tourism organisation.

2.5 To fulfil the requirements of this Work Project you are asked to:

- ✓ Explain sales techniques that can be used to maximize revenue.

2.6 To fulfil the requirements of this Work Project you are asked to:

- ✓ Prepare a sales call schedule,
- ✓ An explanation of influences on the schedule.

INFORMATION SHEET-3	LO3 PREPARE FOR SALES CALLS

3.1Make sales call appointments in advance where appropriate

Before a sales call is to be made, it is important to book sales call appointments in advance. Whilst this may seem like a simple task, the importance of this activity is significant as in many cases it may be the first contact between an organisation and its target audience.

In addition, the process of making initial contact to arrange sales call appointments themselves does take considerable time, quite often when trying to:

- Collecting contact details
- Identify the desired person
- Reaching the actual person or a dedicated assistant responsible for booking sales calls
- Introducing yourself and your organisation
- Explaining why a further sales call is important or beneficial to the recipient
- Trying to book the sales call at all.

Benefits of making sales call appointments for recipients

There are a number of benefits for recipients including:

- ✓ The recipient can be reached at the most opportunistic and appropriate time
- ✓ They can prepare for the sales call by conducting appropriate research discuss the upcoming sales call with their own staff and management
- ✓ Make preliminary purchasing decisions before the call actually takes place
- ✓ Can clarify or ask for further information to help better prepare for the sales call
- ✓ Can schedule time to ensure that they can take the call without disruptions
- ✓ Can schedule other persons whom will be involved in the sales call
- ✓ Can arrange a suitable location for video conferencing or group calls where appropriate.

Benefits of making sales call appointments for sales staff

There are a number of benefits for sales staff as well including:

- ✓ Ensuring the recipient will be available when making the call
- ✓ Ensuring the recipient has all preliminary information at their disposal
- ✓ Ensuring they are not calling at the ‘wrong’ time
- ✓ Allows for scheduling of sales calls.

Activities when making sales call appointments

Make sales call appointments in advance may include:

- ✓ Contacting prospects, including by e-mail, telephone or in person
- ✓ Determining the best time to make the sales call
- ✓ Advising prospect about the content and duration of the sales call
- ✓ Offering to send pre-sales call information for the prospect to read/consider
- ✓ Confirming contact details.

3.2Develop sales call strategies and tactics

Now that sales call appointments have been made, the focus is now on preparing a strategy for the call itself. There must be a desired 'plan of attack' and desired outcome for each and every sales call.

Identify organization's expectations

Since having the right sales techniques and attitudes are so important for generating sales and revenue, organizations naturally expect their sales staff to be equipped with the necessary knowledge, skills and attitude.

As a manager, you need to communicate these expectations very clearly to all the sales staff and ensure they understand fully what is expected of them. This is of great importance as it will reduce future misunderstandings between the sales team and the organisation.

Sales call strategies and tactics

Develop sales call strategies and tactics may include:

- ✓ Basing approaches on market knowledge, current sales focus and consultation with appropriate colleagues
- ✓ Factoring in availability of products and services to be sold
- ✓ Focusing on specific products and/or offers
- ✓ Reviewing customer sales history
- ✓ Assessing current sales figures for nominated periods
- ✓ Meeting activities undertaken by competitors.

3.3 Gather specific information and support materials to support individual sales calls

A common mistake made by many organizations is to hire top-performing sales people without providing them with the relevant information and support required for them to succeed.

It has been found that sales staff that are provided with correct tools and technologies are better prepared for sales presentations, have reinforced confidence and a higher chance of closing the sale. Hence, to optimize sales, it is important that you provide your sales team with the resources they require.

Types of resources

Physical resources may include:

- ✓ Telephone or computer
- ✓ Headset
- ✓ Pen and paper
- ✓ Quiet location or physical space to place calls
- ✓ Stationery.

Types of information and support materials

Information and support materials to support individual sales calls may include:

- ✓ Company profile
- ✓ Brochures
- ✓ Tariff sheets
- ✓ Other handouts and flyers
- ✓ Sales targets and customers' feedback
- ✓ Call sheets
- ✓ Standard contracts
- ✓ Proposal and reporting forms
- ✓ Any other organization's standard forms / documents
- ✓ Third party materials
- ✓ Internet information and hard copy downloads
- ✓ Electronic updates to existing materials and information
- ✓ Display materials
- ✓ Samples, give-a-ways and Incentive materials.

Self-Check 3	Written Test
Name: ___________________________	Date: ________________

Directions: Answer all the questions listed below. Illustrations may be necessary to aid some explanations/answers.

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

3.1 To fulfil the requirements of this Work Project you are asked to:

- ✓ Identify activities undertaken making sales call appointments.

3.2 To fulfil the requirements of this Work Project you are asked to:

- ✓ Identify sales call strategies and tactics used to plan sales calls.

3.3 To fulfil the requirements of this Work Project you are asked to:

- ✓ List resources, information and support materials that need to be prepared for:
  - ✓ A phone sales call
  - ✓ A face to face sales call

INFORMATION SHEET-4	LO4 MAKE SALES CALLS

4.1 Call on prospects in accordance with call schedules

This stage is one of the most crucial when it comes to executing sales planning activities. It doesn't matter how much planning and researching you have done if the initial call is not professional. It is vital that sales staff are not only prepared but make sales calls in a professional, friendly and prepared manner.

You never get a second chance to make a good first impression. Given that the recipient receives many sales calls, any opportunity that you have to speak with potential customers in the first place should be handled in an appropriate manner.

You are the business

On the phone, you are the business. It is important for every person who uses a telephone on behalf of the business to understand that while they are on the phone, they are the business.

The way they use that phone, the way they talk and the information they provide all produce an impression about the business in people's minds and it is important that such an impact reflects the real image of the venue. It is very easy to take the use of the telephone for granted and that is one of the biggest mistakes that workplace telephone users make.

Activities when calling prospects

There are many activities associated with calling prospects including:

- ✓ Reviewing previous call history
- ✓ Ensuring promised information has been researched and is available
- ✓ Ensuring promised materials are ready for distribution
- ✓ Checking personal appearance and grooming
- ✓ Listing personal whereabouts on host enterprise board
- ✓ Calling ahead to remind prospect
- ✓ Ensuring punctuality
- ✓ Determining in advance the sales approach to be used

Establish clearly the purpose of the call prior to calling

A common fault that sales people make when making a phone call is to dial the number and then try to work out what it is they are going to say. This often results in:

- ✓ Confusion for all parties
- ✓ Failure to achieve what was the intended purpose of the call
- ✓ Time wasting

- ✓ A poor reputation for the business.

Before making a call you need to:

a. Establish the purpose of the call - why are you phoning this person or organisation? What is it you want to achieve? Do you want to obtain information or provide it? Exactly what information needs to be captured or given?

b. determine who you need to speak to – this should have been decided when making the sales appointment

c. Have all relevant information at your fingertips – depending on the reason for the call this could include:
   - ✓ Previous correspondence with that person or organisation
   - ✓ Brochures relating to products or services including price lists
   - ✓ Details on discussion you want to have with the other person – such as the details of an offer, the parameters of any negotiation you intend entering into, process, dates, times etc.
   - ✓ Make sure you have a pen and paper handy.

Communicate clearly your name, company and reason for calling

When the other party answers your call the first thing to do is clearly:

- ➢ State your name
- ➢ Identify the business you represent
- ➢ Advise them of the reason for your call.
- ➢ When you place a call, it is important that you immediately identify yourself and the business you represent.
- ➢ You should then either request to speak to a particular person, or explain the purpose of the call so you can be transferred to the appropriate department or person.

Remember that communication is a two-way process and the person who receives your call can best help you only if you clearly let them know why you rang.

4.2 Build relationship and rapport with prospect

Now that the initial introduction has been made, it is important that you are able to:

- ❖ Show respect for the prospect
- ❖ Use appropriate communication styles when making calls
- ❖ Start to build relationships with callers.

Interpersonal communication styles

Important communication techniques include

- Use the caller's name if know – or use 'Sir' or 'Madam' according to house requirements
- Speak at a normal volume – don't whisper and never shout
- Talk at a normal rate – don't rush the conversation
- Use proper English – don't swear, never use slang expressions, don't joke, don't make racist, sexist or ageist comments
- Avoid using industry terms or establishment-specific terminology – this can confuse the caller and make them feel they are being excluded from the conversation
- Eliminate any background noise as far as possible – turn off music, close doors and windows to reduce noise from other areas
- Talk directly into the phone, headpiece or mouthpiece
- Pronounce your words correctly
- Spell any words or terms that you can realistically will be unfamiliar with to the caller
- Be careful how you put the phone down when you are talking to the caller – put it down gently to avoid noise to the caller
- Never talk to a third party while you are on the phone to a caller
- Ask the caller if you can help them in any other way before hanging up
- Thank the caller for the call, where appropriate
- Let the caller hang up before you do.

Be polite and courteous at all times

It is a basic requirement that all sales staff are to be polite and courteous when making a call. When making a call and talking to the party on the other end of the line:

- Always say 'please' when asking for something
- Always say 'thank you' when they have provided information or assistance that was required
- Make mention of your appreciation of any special effort they have made on your behalf - such as extra effort in locating a certain person, finding required information, making a sensible suggestion that may not have solved your problem but has helped it along the way, providing information and feedback or making a sale
- Always remain a professional – even when the other party may be rude, unhelpful, or extremely unprofessional themselves
- Never run down a third party to the person you are speaking to – for example, don't mention to the caller that the person on the switchboard was slow, or you found them to be stupid!

- Even when a sales call appointment has been made, at times the person may be unavailable for many reasons. Ask when a person who is unavailable is likely to be available – or ask them when the best time to call is.

Ways to build relationship and rapport

Whilst the use of effective communication skills is a great start, ways to build relationship and rapport with callers may include:

- Using effective interpersonal skills
- Using the customer's name
- Demonstrating respect for the prospect
- Re-scheduling the call if required by the customer
- Understanding the needs, wants and preferences of the customer
- Explaining and illustrating the capacity and capability of the host enterprise
- Using appropriate verbal and non-verbal communication skills and techniques
- Demonstrating a willingness to be of service
- Thanking the customer for their time.

4.3 Develop prospect trust and confidence

One of the most important aspects of building relationships with customers is through the development of trust in both you as the sales person, but also the product or service you are selling. It is vital that the customer feels that what is being offered to them is being done so to help benefit them, not just to make profits for the organisation.

Ways to develop prospect trust and confidence

Develop prospect trust and confidence may include:

- ✓ Demonstrating personal and professional integrity
- ✓ Telling the truth, including informing the customer about the negative aspects of a product and/or service being sold
- ✓ Mentioning limitations of products and services
- ✓ Refraining from exaggerating a product or service
- ✓ Being prepared to lose a sale rather than telling an untruth
- ✓ Refraining from criticizing the opposition.

4.4 Identify and resolve customer purchasing issues

It is unrealistic to assume that problems will never occur in a business.

It is a fact of any business that problems will occur. In many cases the customer will remember you, not because of the problem itself, but the way in which it was handled and resolved. The handling of any issue or problem the customer may have must be resolved as quickly and thoughtfully as possible.

In today’s competitive hospitality and tourism industry, the unique selling point of your product or service is unlikely to offer a significant technical or profit advantage to your customer. If it does, it is only a matter of time before it is matched or duplicated by a competitor. The standard of customer service you are providing is often the only real product service differentiation you offer compared to your competition. When we, in the customer service industry, hear the words ‘customer complaint’, we have a choice of reacting in a negative way, or deal with the complaint in an efficient, caring and professional manner.

Every employee is responsible for the delivery of customer service. You are the organization to the customer, irrespective of your individual role. This is the case for small retail organizations and even the larger ones who have many outlets and many departments, including those behind the scenes.

Customer service starts and ends with the customer interacting in some way with an employee. So, all employees and all levels and all functions of the organization have a responsibility.

It can be said that acquiring new customers can cost several time what keeping existing customers costs. The value of repeat customers can greatly sustain the profit of your organization. ‘Doing it right the first time’ is an important way to attract and keep these lifelong customers. However, sometimes we do get it wrong. In the real world, customers do get upset, angry, aggressive and sometimes irate. It is how we deal with these situations can determine if the customer stays or if they go.

Identify and resolve customer purchasing issues
Whilst the types of issues or problems may be endless, ways to identify and resolve customer purchasing issues may include:

- ✓ Presenting a business proposal to the customer, where appropriate
- ✓ Explaining the benefits of the products and/or services being promoted
- ✓ Highlighting the advantages of purchasing products and services from the company
- ✓ Describing how the proposed products and services meets identified customer needs, wants and preferences
- ✓ Adhering to pre-prepared sales spiel.

Handling complaints

Having correct and well established policies and procedures for how staff deal with these complaints is very important. We can maximize the satisfaction of our customers if we follow these five rules:

Listen to understand

When the customer is giving you information about their complaint, listen and absorb the information. Let the customer vent their anger as they are going to want to get it off their chest. If necessary, repeat information back to the customer to check that you understand what it is they are complaining about.

Ask questions

Use open questions so you can fully understand.

Offer apology

It is important to let the customer know you are sorry for any inconvenience if they are making a legitimate complaint. Offer an apology whether the complaint is directly linked with you or not. Remember, every employee has the responsibility to keeping the customer happy. It is important, however, not to over apologies. This just emphasizes the fact the customer is not happy. One apology is sufficient.

Take action to solve and communicate

The solution you offer needs to be fair and just. If you offer the customer a couple of solutions and they are still not satisfied, your final avenue to go down to satisfy your customer is to ask the customer what they think you can do to keep them happy. The action taken must be within reason. If you have taken some time to help the customer, it may be possible you need to call them at a later time. Make sure you keep up your communication and update the customer on the situation.

Remain courteous

If you remain cool, calm and collected, you will gain control of the situation and can turn the customer around from being possibly irate, to calming down and leaving your store happy and friendly.

Can't provide an answer

In any sales call, whilst you may have endless information in relation to a product or service you are selling, there may be a question or complaint asked by the caller that you are unable to answer.

The key here is not to provide an inaccurate answer or solution that is not possible. This will only cause further problems. When this occurs:

- Apologies
- Ask the caller if you can make some enquiries yourself and get back to them
- Take their details and details of the question or complaint
- Thank them for their call
- Find out the required answers
- Phone them back
- If you are having difficulty tracking down answers to their questions or complaint:
    - ✓ Ring them and let them know you haven't yet got the answer
    - ✓ Apologies
    - ✓ Explain the situation
    - ✓ Let them know you are still following up Make a time to phone them back with the required answers– and repeat this process —where you still can't find answers.

4.5 Use selling techniques to optimize sales opportunities and meet/exceed sales targets

A sales job is a very demanding one. It involves not only just selling but being in touch with customers regularly, knowing the organization's products / services well and searching for more sales opportunities.

Sales job is also often faced with rejections which can be very discouraging. Hence, to be successful in a sales job, the sales staff must possess a multitude of knowledge, skills and attitudes, such as:

- ❖ Extensive knowledge of the organization's products / services and the business environment it is operating in.
- ❖ Sales techniques such as customer service, up-selling or add-on selling.
- ❖ Effective communication skills.
- ❖ Proper attitude such as being positive and self-motivated.

Importance of sales techniques

The success of businesses today can be directly related to the quality of its sales staff and their ability to meet consumer demand. Particularly for the hospitality industry where organizations such as airline companies, hotels, tour operators or restaurants rely on on-going buying from customers, sales techniques are even more critical. The need to compete for the same dollar also makes sales techniques increasingly more important and relevant than before. And with consumers being much more informed than ever, the ability to build relationship with customers is instrumental in persuading them to make purchases to generate repeat business.

There are a number of sales techniques that all professional sales people need to possess.

Importance of positive attitude and self-motivation when selling

Besides sales techniques, it is important that sales staff have the right attitude. Studies have also shown that 50% of sales people fail because of lack of positive attitude, which is a key sales tool that most sales people tend to undermine the importance.

A sales job is constantly challenged by rejections. Sales staff often lose their interest when they are rejected repeatedly. It is thus important that they do not take the rejections too personally and get de-motivated as a result. But this is easier said than done.

A high level of motivation would be necessary to help them overcome such discouragements if they do not have a positive attitude or are not self-motivated

Customer service

Customer service can be defined as a series of activities that your sales team undertake to meet customers' expectations and to enhance the level of customer satisfaction. High quality customer service is important for the following reasons:

- ❖ Create loyal customers and repeat business
- ❖ Differentiate a company from its competitors
- ❖ Encourage word-of-mouth publicity.

Understanding the importance of customer service is important as it is the first step to delivering exceptional service to all customers.

Basic sales techniques

The best way to encourage customers to use and buy products and services is to promote them according to a few simple guidelines:

- ❖ Don't try encouraging customers to purchase something they don't want
- ❖ Encourage customer to purchase something they may want.
- ❖ To adhere to the above guidelines, staff must be accurately informed about the product and service and have the ability to match those products and services according to the customer's needs.

- ❖ Make sure staff realise common sense should always be applied when matching products and services with customers, and any promotion should be done in accordance with establishment policies and procedures.
- ❖ Effective questioning and listening skills are also vital in this part of the buying phase.

Additional tips include staff should be made aware of include:

- ➢ ***Identify reason for purchase***

They should try to identify as quickly as possible the predominant driver behind the need for the customer to make their purchase – "Why do they want to make this purchase?" This is a very important question that governs and controls many of the other buying-related decisions.

The answer to this question will provide a contextual frame of reference for further questions and deliberations determine the price they are willing to pay – is there another price they are expected to match, or is the customer simply wanting to get 'it' and get out, regardless of the cost?

- ➢ ***Working out who will make the actual and final purchase decision***

The person who makes the buying decision is not always the person who will pay for it. Staff need to know who to direct their sales efforts at.
A common mistake is for sales assistants to direct their flow of information, advice and product knowledge to the male in a 'buying couple' when it is the female who will make the buying decision.

- ➢ ***Provide options and alternatives***

It is important to be sensitive to other factors (such as, are they in a hurry? are they determined to buy Product X, Model Y regardless?), but most customers appreciate having time spent with them and having their choices explained to them.

- ➢ ***Put the purchase into context***

In some cases, the purchase may not take place in isolation from other factors and staff are obliged to advise the customer about these allied features. For instance, selling a computer without advising, suggesting or explaining the need for software (or printer, or scanner, or other add-ons) is inappropriate as it may result in the customer buying something that doesn't suit their needs even though those needs were not explicitly stated.

- ***Be sure to mention any benefits that apply 'now'***

There will be times in retail sales when the customer really is on the receiving end of a good deal because of some promotion or sale or special that is on offer.

Staff owe it to both the organisation and the customer to identify and highlight these times and explain how the current deal represents such excellent value. The point being staff can't expect the customer to know they are getting a fantastic deal.

- ***Promote the value-adding aspects of the sale***

It is dangerous and counter-productive to just focus the sales effort on the selling price. Most customers do not just buy on price alone, anyway. As sales professionals staff should identify and explain the totality of the purchase by highlighting all the factors that add value to the purchase. These may include:

- ✓ Training
- ✓ Free delivery
- ✓ Extended warranty period
- ✓ Free additional services, gifts or products
- ✓ Allied discounts on associated items
- ✓ Back-up service, including repairs and advice
- ✓ The feeling of confidence and security that comes with buying locally.

- ***Ask lots of 'open' questions***

These questions get the customer talking and are the best way of obtaining information.
Staff should consider the need to change the nature and focus of their questions to 'refine their search' in their quest to identify exactly what the customer wants, and how best they can meet that expectation.

The further they get through the search for information, the more closed questions become useful, but they are, generally, less effective in the early stages of determining customer needs and wants

Types of selling techniques

Use selling techniques may include:

- ⇨ Offering bonuses and incentives, including the use of give-a-ways
- ⇨ Creating packages to add value to the business
- ⇨ Change terms and conditions, where practical, to better suit customer needs/preferences
- ⇨ Recognizing opportunities for making additional sales
- ⇨ Advising customer of complementary products or services according to customer's identified need (s)

⇨ Demonstrating the ability to make add on sales, to up-sell, to use suggestive selling techniques and to use other approaches to maximising sales
⇨ Demonstrating the ability to be an order maker and not just an order taker
⇨ Complying with enterprise policies in relation to selling.

Up-selling

This is also known as add-on selling. Up-selling is just simply a way to get your customers to spend more money on your organization's products or services. The objective is obvious – to generate additional revenue. Studies have found that between 25 – 40% of customers will buy up-sells for quite a simple reason. They have already committed to buying your product or service, so they do not want to miss out on any opportunity to get something extra at a special price.

Up-selling is a valuable technique for increasing revenue and profitability. But it is not just a tool for this purpose. Up- selling is also a means of increasing customer satisfaction because you are suggesting additional products or services that meet the customer's needs.

However, up-selling is only effective when you have established relationship with your customers who know and trust your service level and quality. The biggest obstacle to upselling is when the sales staff neglect to ask whether customers are interested in upgrades or additional products or services.

Since sales techniques are so important for increasing an organization's business, as a manager, you must therefore communicate this importance to all your sales staff and ensure they apply these techniques to help optimize sales for the organisation

Overcoming buying objections

As mentioned above, sales persons will often be confronted with rejection or hesitation when customers are not committed to purchasing. Overcoming buying objections including:

⇨ Identifying and accepting customer objections
⇨ Categorizing objections into price, time, product/service characteristics
⇨ Offering solutions according to enterprise policies
⇨ Applying problem solving to overcome customer objections
⇨ Using the 'feel-felt-found' approach.

Closing the sale

Closing the sale using accepted strategies which may include:

- ⇨ Monitoring, identifying and responding appropriately to customer buying signals
- ⇨ Encouraging customers to make purchase decisions through the use of appropriate and acceptable verbal and non-verbal prompts
- ⇨ Congratulating the customer on their selection
- ⇨ Thanking the customer for their business
- ⇨ Encouraging the customer the return to make further purchases.

4.6 Provide information on product features and benefits in accordance with host enterprise policies and procedures

In many selling situations, there is a need to demonstrate selected products and services to the customer with the intention of:

- Showing how things work
- Proving their capability
- Communicating features and benefits
- Enhancing the chance of making a sale.

Provide information on product features and benefits

Suppliers and manufacturers will supply you with data, statistics, facts and figures about products you have for sale. They do this to increase your product knowledge and to support you in your endeavors to sell their goods.

The facts and figures about an item are the 'features'. However, in many selling instances, these facts and figures are of little use, and quoting them to customers can actually hinder the selling process.

While there are some customers who are motivated to find out every detail about a product, there are many, many more who are totally disinterested in the features, but desperate to know the benefits.

The 'benefits' are the things that the product can do for, or bring to, the customer. In the selling process, you should always aim to:

- 'Sell the benefits, not the features.'
- 'Features are fantastic' but 'benefits are best'.

Benefits you should look for in order to increase the chances of selling include points such as:

- ✓ It's fast
- ✓ It has better views

- ✓ The rooms are bigger
- ✓ The package is longer
- ✓ The trip is shorter
- ✓ It is more comfortable
- ✓ It will save money
- ✓ It's light
- ✓ It's hard-wearing
- ✓ It's compatible with what you've already got
- ✓ It's easy to use
- ✓ It will save time
- ✓ It's portable
- ✓ It will make you healthy
- ✓ It's safe.

Methods to explain product features and benefits

Methods of explaining product use may include:

- ✓ Providing promotional material, including brochures, third party materials, videos/digital video disc (DVDs)
- ✓ In-house training
- ✓ Demonstrations
- ✓ Letting the customer have a go
- ✓ Supplying verbal explanation
- ✓ Using the organisation's website in conjunction
- ✓ with the customer
- ✓ Relaying anecdotes to the customer
- ✓ Walking' the customer through the instruction
- ✓ manual, or similar
- ✓ Showing examples of what the product can do
- ✓ Listing specific examples of what the item cannot do

4.7 Encourage feedback from prospects and customers

Obtaining and acting on feedback can benefit your workplace in terms of both profit and customer satisfaction. Feedback from customers can come back in the form of a complaint or a compliment. Determining exactly what the customer's needs and wants are, and whether the sales and service delivery can be adjusted in a responsible, cost effective manner should always be considered by any business enterprise.

At some stage, it is more than likely that sales and service delivery may have to be changed in some way due to the feedback given by a customer. Changes due to positive or constructive feedback given by the customer.

Importance of customer feedback

Customer feedback is essential. It acts as a tool to management to gather information from customers and can, in the retail industry, be a cheap source of market research.

The following questions can be asked to gather customer information:

1 Who are your customers? Ie., male, female, age, socio- economic location,
2 When are they likely to be your customer? Ie, constantly, once a year, every weekend.
3 Why are they your customer? (instead of a competitors)
4 What do your customers want?
5 How can your customer feel valued?
6 What can you do to keep your customer?

Collect and analyze data about customer and staff feedback

Base your strategic decisions on the outcomes of the analysis as well as your gut feeling. There is a range of data, information, reports and statistics available to managers that contribute to decisions. Successful people use gut feelings to make decisions. Gut feelings are the result of:

- ✓ Lifetime learning
- ✓ High levels of decision making practice
- ✓ Trust in own abilities
- ✓ Knowing when enough information is enough

If you withdraw yourself into a bunker and never have time to be with your customers and your staff, then your organization will fail. There is nothing more important than satisfied customers in your business area. Customers can still leave your organization with a positive impression, even if they did have a complaint. So long as the complaint was dealt with properly by your staff and the customer has ended up being satisfied. Customers are the core of business.

Ways to encourage feedback

Encourage feedback may include:

- ✓ Asking customer for feedback
- ✓ Leaving customer with a customer comment card to complete and remit to the organisation
- ✓ Encouraging the use of online feedback forms

- ✓ Noting comments made by the customer
- ✓ Asking customer what it would take for them to make a purchase/booking.

4.8 Seek market information from prospects and customers

In the previous section, we have seen the importance of collecting feedback from customers, not only in relation to the success of sales and promotional activities, but in relation to any aspect of operations.

It is important to collect market information to ensure that what you are providing is competitive to what the competition is also providing.

Seeking market information

Seek market information may include:

- ⇨ Asking customer questions about their last/previous tours, trips, travel experiences
- ⇨ Applying a pre-prepared market research form
- ⇨ Asking for names and contact details of other people they believe may be interested in the products and services being offered.

As can be seen throughout this manual, the process of planning and executing sales activities are quite detailed and requires various skill sets. That said, the fundamentals of selling is still quite simple – informing and providing customers products and services they want!

Purpose of collecting market information

❖ ***Measuring Customer satisfaction***

This allows an organisation to:

- ✓ Develop training
- ✓ Increase customer service awareness
- ✓ Focus staff/management performance effort
- ✓ Evaluate performance according to pre- determined criteria.

❖ ***Identify an organizations strengths and weakness***

- ✓ Reward staff
- ✓ Monitors performance levels
- ✓ Achieve quality.

Measuring Techniques

- ✓ By conducting surveys of:
  - ➢ Non Users
  - ➢ Customers
  - ➢ Suppliers
  - ➢ Staff
  - ➢ Management
- ✓ By Observation (mystery customers)
- ✓ Recording informal feedback (complaints diary)
- ✓ Checking Financial data
- ✓ Analyzing Customer data.

The level of satisfaction a customer will have with the goods or service provided by your organization will vary from customer to customer. Remember, quality is in the eye of the customer, and each customer is different.

Self-Check 4	Written Test
Name: ___________________________	Date: ________________

Directions: Answer all the questions listed below. Illustrations may be necessary to aid some explanations/answers

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

ROLE PLAY

You are to undertake a role play where you are the sales person trying to sell a product or service associated with a tourism organisation of your choice. The trainer or other class participant will play the role of the customer. As part of the role play you are to demonstrate competency in:

- ❖ Establish clearly the purpose of the call prior to calling
- ❖ Communicate clearly your name, company and reason for calling
- ❖ Use appropriate interpersonal communication styles
- ❖ Be polite and courteous at all times
- ❖ Build a relationship and rapport with the customer
- ❖ Show ways to develop prospect trust and confidence
- ❖ Use appropriate sales techniques
- ❖ Provide information on product features and benefits
- ❖ Overcoming any buying objections
- ❖ Closing the sale
- ❖ Collect and analyse data about customer and staff feedback
- ❖ Ways to encourage feedback

INFORMATION SHEET-5	LO5 REVIEW AND REPORT ON SALES ACTIVITIES

5.1 Review sales activities in accordance with established methods

Reviewing sales performance is important as it helps us to identify what had happened and to determine how future performance can be improved. It is hence a means for a manager to direct the activities of the sales staff and manage their performance.

As such, sales performance should be reviewed on a regular basis. Otherwise, problems may be detected too late and corrective actions may not be taken in time to ensure optimal sales performance.

Reviewing sales performance also helps us to discover the strengths and weaknesses of our sales staff, and to identify opportunities for improvement. For example, sales techniques demonstrated by outstanding performers may be adopted by others in the sales team, while weaknesses identified can serve as a basis for the individual's self-development. Hence, by reviewing sales performance regularly, you can proactively develop improvement plans to guide and help sales staff to perform better.

Reviewing, analyzing and monitoring sales activities

Analyzing and monitoring sales regularly is an important aspect of sales management. By analyzing sales performance, we can see clearly the direction in which our sales are headed. We can also conduct comparative studies to make informed decisions on how to improve our sales performance further. Identifying the true performance of the sales team is important in that it helps us to:

- ✓ Ensure sales targets are realistically set so that motivation levels can be kept high
- ✓ Identify the strengths and weaknesses of the sales force, so that we can determine the type of training required to improve the performance of the sales force

Reviewing activities

Review sales activities may include:

- ➢ Evaluating the results of the sales activities with reference to the nominated key performance indicators and sales objectives established by the organisation
- ➢ Evaluating the activities undertaken to assess suitability, cost, effectiveness and acceptability to the target market populations
- ➢ Identifying innovative activities and suggestions that may have arisen during the previous period.

Determining what data to collect

The first step to analyzing and monitoring sales is to determine what data to collect. There are generally two types of data that you may collect and use for analyzing sales.

Quantitative data

- ✓ Actual sales generated
- ✓ Expenses incurred
- ✓ Number of contacts or prospects
- ✓ Number / Percentage of no-shows
- ✓ Number / Percentage of cancellation
- ✓ Sales mix.

Qualitative data

- ✓ Feedback from customers or colleagues
- ✓ Booking patterns
- ✓ Customer satisfaction levels
- ✓ Effectiveness of sales staff in prospecting new clients.

To have accurate and useful information on sales performance, you should make use of both quantitative and qualitative data. However, quantitative data is often preferred because it is expressed in numbers and is measurable, and it allows unbiased evaluation of sales performance using statistical procedures.

On the other hand, qualitative data being only observable and not measurable is considered to be subject to biased interpretation, as it depends on people's opinions, knowledge and assumptions. Hence, qualitative data is not widely used. But qualitative data can sometimes tell you things and quantitative data cannot. For example, qualitative data may reveal why your sales techniques are working or not working, or the reasons why customers are or not buying your organization's products and/or services.

Take note that the type of data to collect will depend on the type of information you want to know and have. It will also depend on the resources you have for collecting the desired data.

Required sales data is usually collected and reported by the sales staff or sales support team, and the data is normally input / recorded into a sales management system or any related database software.

5.2Incorporate results of reviews of sales activities into future sales planning

With all the information we obtain from the analysis and reporting of sales, as well as those from the evaluation of products / services, we are now ready to interpret these information to make decisions on how to further improve our sales performance.

Using sales findings for future sales planning

Interpreting sales analysis and evaluation of products / services is important, as the conclusions we draw will allow us to:

- Track the performance of our sales team and develop appropriate strategies to help them perform better.
- Better understand the performance of our products and services and determine how to exploit their strengths and enhance their weaknesses.
- Make better sales forecast and set more realistic sales targets in future.

In short, we will be able to:

- Identify the sales turnover achieved by our sales team
- Determine trends in sales and consumer preferences
- Distinguish between strong and weak products / services.

5.3Prepare sales report

A critical aspect of sales management is sales reporting. Sales reporting is necessary because it provides important information for us to:

- Determine sales patterns
- Keep track of progress of sales team
- Identify flaws in sales approaches.

Since sales reporting plays such an important role in sales management, it is thus important to ensure that accurate sales reporting takes place. It is only through accurate sales reporting that you can obtain reliable information for making sales management decisions.

Need for accurate and relevant reports

It is important to maintain accurate and relevant reports in a manner that can be quickly accessed when necessary. This will enable you and other relevant staff to quickly and easily refer to any policies and procedure they need to learn or be trained in, or just refer to as a refresher.

These reports, when updated, may require consultation with another department or higher management. The replacement or adjustments needs to be closely examined by the right person.

It is therefore very important to maintain constant and accurate records and reports to base any decisions on and ensure the continued smooth running of your workplace.

Sales management system

To produce accurate and useful information and sales reports, it is critical that the data used to create these reports be obtained from reliable sources or database. Poor quality data will lead to poor and inaccurate sales reports. Fortunately, due to technological advancement, sales reporting has become much easier these days.

With the development of sales management systems, many organizations are now able to automate their sales reporting function. Sales management systems typically allow sales data to be input and stored easily. They can also analyze the sales data automatically and are able to churn out relevant and useful sales reports needed by you or your management to make decisions.

Today, there are many sales management software's available in the market to help managers manage their sales teams more effectively. Ranging from simple, user-friendly ones to the more sophisticated programmes, these software's typically allow you to track sales easily and produce instant reports when needed.

Ensuring accurate data entry

Even though the sales management system is able to provide excellent information and reports, do bear in mind that the accuracy of such information and reports is still very much dependent on the accuracy and currency of the data entry.

Recording and inputting sales data into sales management system may be done by the sales staff themselves, sales administrator or other supporting departments. As a manager, you therefore not only need to ensure that these people record the data correctly into the sales management system, you also need to ensure they do so regularly and diligently.

Without correct data input, even the best sales management software in the world will not be able to help you make the right decision and implement appropriate action plan to achieve your sales targets. Thus, as a manager, you need to:

- Train all staff involved on the policies and procedures for data reporting.
- Oversee data entry into the sales management system
- Policies and procedures for data reporting may include how and when:
  - ✓ Data entry should be carried out
  - ✓ Data will be analyzed

- ✓ Reports should be produced.

- ➢ Overseeing data entry into sales management system requires you to:
    - ✓ Supervise the staff during data entry, which may include training data-entry staff how to use the sales management software and allocating duties to them.
    - ✓ Proof and verify that data is correctly recorded / input into sales management system.
    - ✓ Ensure daily sales reports and/or other routine reports are generated on time.

Preparing sales reports

Sales analysis and reporting can reveal important facts about the progress of your sales team and help sales staff and you make necessary adjustments along the way to further improve sales performance. Important facts that a manager typically wants to know may include performance of individual sales staff and individual product or service. Sales analysis can also reveal an organization's profitability, by departments or even by individual products.

Hence, another important function in managing sales is to analyze and report sales data. Sales analysis and reporting may be carried out using information technology or done manually. The former is made possible through the use of sales management software, while manual reporting entails analyzing data from a database and converting the data into a report using spreadsheets and office software's.

Whether it is automated or done manually, analyzing and reporting sales data typically involves the following processes:

- ✓ Collating and organizing sales data according to requirements.
- ✓ Computing and extrapolating data to generate relevant information.
- ✓ Summarizing and presenting findings in a sales report.

When preparing reports they must be done in accordance with:

- ✓ Required timelines
- ✓ Enterprise procedures
- ✓ Meet presentation requirements

Collating and organizing data

The first step to analyzing data typically involves organizing the data in a certain way, such as listing or arranging the data in a table and a particular order. This may include sorting the data by account, by individual sales staff, by transaction date or in any way appropriate to your interest.

Computing and extrapolating data

With the data organized in an appropriate way, you are now ready to do some computations to find meanings to your data. Computing and extrapolating data may include:

- ✓ Simple calculation of total values, average values, medians or modes.
- ✓ Comparing actual results obtained to pre-established goals or benchmarks to determine deviations from expected performance.
- ✓ Plotting data into graphs and charts to identify trends or patterns.

Summarizing and reporting data

The last step in data analysis is of course to summarize and present your findings in a report. There is no standard format for reporting your sales data. How you do your reporting depends on:

- ✓ The sales management system you are using.
- ✓ Your organization's requirements and guidelines for reporting data.

Contents of a sales report

Information contained within sales reports may include, but is not limited to:

- ✓ Identifying outcomes in terms of key performance indicators and sales objectives
- ✓ Identifying sales, bookings and enquiries by individual members of the sales team
- ✓ Identifying specific factors that impeded sales efforts, including weather, political activity, economic conditions, staff illness, competitor activity
- ✓ Indicating emerging trends
- ✓ Indicating products and services that are being regularly mentioned by customers and prospects
- ✓ Recognizing and acknowledging effort by the sales team.

5.4 Provide identified market intelligence to assist in sales planning activities

Periodically, there will be a need for you to provide your team and management with feedback in regard to achievement or non-achievement of agreed service standards and performance targets. This feedback must:

- ➢ Be fair and accurate
- ➢ Be based on facts
- ➢ Not be personal in nature.

Methods to sharing sales related information

Share sales-related information may include:

- ➢ Holding team meetings
- ➢ Providing hard copy information
- ➢ Sharing information via the intranet

- Disseminating information at staff briefings.

Explaining sales report information

There are many pieces of information that may be presented including, but not limited to:

- Explaining if your sales strategy and effort work
- Identifying the reasons why they work or not work.
- Significant variations and the factors associated with the changes.
- Unusual results and determine their causes.
- Patterns and trends in consumer behaviours, and the factors that resulted in those behaviours.
- Strengths and marketing opportunities.
- Weaknesses and potential areas of improvement.
- Impact / implications of the results and conclusions on sales performance

Providing identified market intelligence

Provide identified market intelligence may include:

- Providing new market research data
- Providing recent feedback from clients
- Providing information gathered as a result of personal observation and experience
- Providing data relating to all sales that have been made, including types and volumes of products and services, commissions, timing
- Passing on names and details of prospects to relevant other staff, including referring corporate contacts to the corporate client manager and appropriate others
- Supplying information about new sales techniques and strategies to the sales team
- Advising sales team of changes to relevant organizational policies and procedures.

5.5 Share sales-related information with sales team members

After you have received the regular reports and had time to analyze, evaluate and reflect on what they are telling you, there is a need to communicate your findings to the staff at either an individual level or a departmental level.

Providing information to staff and colleagues

It is a good idea to have these feedback sessions on a regular basis. Some organizations do them daily. The idea of having them regularly is not just to keep team members up-to-date, but also to get them used to having these meetings. There is nothing more damaging to staff morale to begin thinking that every time a meeting is called it must mean bad news.

Daily meetings need only take five minutes and can be done around a morning coffee before work, or standing up at the servery or register. This style of ‘meeting’ doesn’t have to be a sit down affair that runs for 30 minutes.

Your presentation of this information can be at an informal meeting. It is best to do the presentation at a meeting so that everyone gets the story together so that different versions of the facts don’t start to circulate. It is a good idea to:

- Give a general comment – to indicate whether we are on track, ahead of expectations or falling behind
- Focus their thoughts – recap and explain the targets that were set for the department/store
- Assure staff – tell them this is just an information session and stress that no jobs are on the line unless, of course, they are Cover each target, one at a time – use each of the targets and go through them individually, giving details and statistics as they apply. Stick to the facts and don’t allow irrelevancies from yourself or team members to intrude
- Give specific examples as opposed to generalisations – quote statistics and cite the sources of any information used (sales receipts, advanced orders, cash banked, ‘stock sold’ sheets)
- Interpret the findings and tell staff what it all means - have they achieved or not achieved?
- Explain what the results mean – given the information you have supplied, it is then necessary to outline exactly what impact the results are likely to have. This may include changes to training, hours, service standards, store layout, advertising, etc.
- Thank and congratulate everyone – do your homework before the meeting and make sure you can find several positives from the information with which to close the meeting. Then thank the staff for their commitment, their time and attendance and their contribution.

Providing regular feedback

Timely, regular feedback on achievement of sales targets is important for driving better sales performance. This is because timely information on successful or failed achievement of targets/ goals allows the sales staff to react quickly and make adjustments to re-direct their efforts to handle the challenges faced. This is critical as it helps increase their chances of success ultimately.

For feedback to be effective, sales staff should be informed about the time and procedure to receive feedback. Feedback should not come as a surprise to any staff. When providing feedback, you should communicate actual performance to the sales staff, be it positive or constructive. In the event of the latter, the focus should be on how he/she can improve and the necessary actions to make improvements.

When providing feedback to sales staff, we should also listen to his/her views to obtain an understanding of the prevailing issues that could have prevented him/her from attaining his/her sales targets. Showing empathy and concern is a good motivational practice, as this can drive the sales staff to greater achievements.

Rewarding team members

Studies have found that incentives/rewards play an important role in increasing the motivational levels of sales staff and hence the sales performance. Thus, planning a right reward system or compensation package is an important task that all managers involved in managing sales teams need to perform.

There are many ways to set up a reward system for your sales staff. Compensation options that you may use to motivate and reward your staff are generally classified into financial or nonfinancial options.

Financial options

Commission

Commission, as a form of incentive pay, is a payment made to the sales staff based on the value of sales achieved. It is a reward for the quantity or value of sales achieved, and is believed to be effective in motivating sales staff to sell more.

How much commission is paid out to sales staff is dependent on the organisation's corporate strategy and guidelines. However, take note that when deciding on the commission plan, it is important to take into consideration seasonal sales. This is particularly important for the hospitality industry where there is low season.

Also, if the commission is for group effort, then the manager must ensure that all team members contribute equitably with similar efficiency and effectiveness.

Bonus

In sales management, a bonus is a one-time payment given out as a reward for the successful achievement of sales targets. This type of incentive is often used for encouraging sales staff to work harder for the next budget period.

When using bonus as a reward to recognize good performance, it is important to determine the right timing of giving out the bonus. For bonus to be effective in motivating sales performance, it should be given during the time when the sales staff need the extra cash, such as during the festive season or at the beginning of a new school year.

Profit-sharing
Sometimes, organizations may reward their staff by sharing with them the increased profits for the year. Like bonuses, this type of reward is also effective in motivating sales staff to work harder for the next budget period. Profit-sharing makes sales staff feel valued by the company, which in turn leads to improved loyalty and productivity and hence sales.

Non-financial Options
Studies have also found that non-financial rewards are just as effective in motivating sales staff and driving sales performance. Non-financial rewards can take several forms, but they are typically categorized into rewards and recognitions. Some common rewards and recognitions are:

Rewards

- Achievement award such as plaque or Certificate of excellence
- Time-off
- Gift vouchers
- Gifts
- Incentive trip
- Opportunity for personal development such as sponsorship for training or education.

Recognition

- Praise
- Public recognition through announcements during staff meetings or corporate events
- such as annual dinner and dance
- Empowerment
- Promotion.

Take note that when planning a reward system for your sales team, you need to ensure the reward system is aligned to the organization's overall business objectives. You must also ensure that the rewards are attractive enough to retain your best sales staff, and are effective in encouraging or discouraging specific behaviors. In short, rewards need to be meaningful to the individual sales staff if they are to be effective in motivating sales performance. They must be able to meet the individual's motivational needs at that point in time when the reward is given out.

Giving negative feedback to individuals

Where there are opportunities to pass on a 'well done' to a staff member this can usually be done in front of others. For instance, a customer may have sent a note that praises a staff member for their assistance, extra effort, honesty or pleasant disposition. This could be read out in front of everyone as an example of what can be done, and of how appreciative customers can be.

We should take every opportunity to pass on any positive feedback to staff. Unfortunately, there will also be times when negative feedback has to be delivered to certain staff members.
There is usually only a need to talk to staff on an individual basis where:

- Their sales are below expectations when compared to the efforts of other staff – we absolutely don't want to embarrass team members in front of their peers
- Complaints have been received against that team member – any compliments should be passed on in a team setting so that everyone hears of it and can celebrate the good news.

Guidelines for providing negative feedback

- ***Do it in private***. Never succumb to the belief that it can be done in a group setting and the rest of the group can function to offer support - you will only succeed in embarrassing the person and raising all sorts of other problems
- ***Be sympathetic and empathetic*** – explain to the person that everyone gets negative comments from time-to-time and acknowledge that they are still doing a great job
- ***Stick to the facts*** – never fall into the trap of letting this occasion become an excuse to begin talking about other un-related issues
- ***Use the positive-negative-positive sandwich idea*** – start off by highlighting positive aspects of the work they are doing, then mention the negative bits (non-compliance, non- achievements, below standard delivery, complaints) but finish with a positive comment ("but look, overall you're doing a really good job and I'm rapt to have you as a valuable member of the team")
- Be honest, but sensitive.

Self-Check 5	**Written Test**

Name: ___________________________ Date: ________________

Directions: Answer all the questions listed below. Illustrations may be necessary to aid some explanations/answers

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

5.1 To fulfil the requirements of this Work Project you are asked to:

- ✓ Explain how you would monitoring sales activities
- ✓ Identify what data you would collect as part of the review process.

5.2 To fulfil the requirements of this Work Project you are asked to research and identify

- ✓ Identify how you would use sales findings for future sales planning.

5.3 To fulfil the requirements of this Work Project you are asked to:

- ✓ Explain the contents of a sales report.

5.4 To fulfil the requirements of this Work Project you are asked to research and identify

- ✓ Explain how you would deliver a sales report to management
- ✓ Explain key points that need to be communicated.

5.5 To fulfil the requirements of this Work Project you are asked to research and identify

- ✓ Explain how you would deliver a sales report to staff
- ✓ Explain key points that need to be communicated.

Recommended reading

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