



Unit 28: Sales Techniques and Processes

Delivery guidance

Approaching the unit

In this unit, learners will acquire a detailed understanding of the techniques and processes that can be utilised to maximise sales.

You will be able to draw upon the personal experience of your learners, many of whom are likely to have engaged with a salesperson when purchasing high-ticket items such as mobile (cell) phones and clothes. Learners could be asked what their expectations are as consumers when purchasing products, and what characteristics they associate with an effective salesperson. They could also be asked to describe situations when their expectations of a salesperson have not been met. Following on from this, individual learners could be required to prioritise what they consider to be the characteristics of a successful salesperson and then compare their responses with those of other learners in the class.

This approach would then enable you to provide an overview of the content of the unit to your learners and you would then be able to refer back to this introductory exercise at various stages in the course. For example, you could draw upon their experience of the sales process, particularly when they engage in classroom role-play exercises as either a customer or a salesperson.

Although many of the classroom-based activities completed by the learners are likely to be practical in nature, involving such strategies as role-play, participation in meetings and presentations, it is important that such exercises are supported by a clear knowledge and understanding of sales techniques and processes. In other words, your learners should see these exercises and the internally-assessed assignments as providing them with the opportunity to *apply* the knowledge of the sales function they have gained in practical situations. This is particularly important when covering the part of the unit in which they consider the ethics involved in the sales process. For example, you may set your learners an exercise in which they are required to generate additional revenue from the sale of a new product. Learners should be actively discouraged from engaging in unethical sales practices in order to achieve business objectives. They should understand the risks to the business and themselves if they promote such sales practices, as difficult as this sometimes may be when seeking to close a sale.

The application of knowledge and understanding in this unit covers such aspects as customer profiling and sales systems, the legal implications governing the sales process, and the quantitative measures that can be applied to gauge the success of the sales function. Learners will also need to apply their numerical skills when completing quotations and analysing sales figures.

Your learners will also need to exhibit a range of personal qualities and business skills such as communication, empathy with the customer and organisational skills. You should assess these skills within learning aim C, which requires learners to assess and evaluate their own competence levels with regard to sales techniques.

The unit introduces learners to the various stages of the sales cycle and the skills needed to be effective in a sales role. They will learn what contributes to the buyer decision-making process for both the end consumer and business-to-business customer.

Learners will be taught how to generate and qualify sales leads using a range of information. They will learn the importance of using market information and keeping accurate records for future prospects.

Learners will develop a range of selling skills, including selling by telephone – both inbound and outbound – and selling face-to-face. They will learn how to overcome objections and how to create opportunities to sell additional products and/or services. They will also learn the importance of selling ethically.

Finally, learners will learn about the different ways to close a sale and how to process sales orders. They will understand the importance of customers being informed about discounts and other promotions. They will also develop an understanding of different payment methods and the importance of customer credit checks. They will describe the despatch and related service functions that the customer needs to know about in order to follow the progress of their sales order.

To complete this unit, your learners will need access to a range of research materials, which could include sources of information and tools on the internet, journals, magazines and books.

You can use a range of delivery methods in this unit, such as:

- discussions, e.g. class and small group discussions
- individual or group presentations
- case studies illustrating selling techniques used by both well-known and lesser-known businesses
- videos, e.g. TED talks on sales techniques.

Group work is an acceptable form of delivery, but you must ensure that each learner produces sufficient evidence on their own for assessment.

You can involve local employers in the delivery of this unit by inviting them as:

- guest speakers
- members of the audience for learner presentations
- contributors to case study material
- providers of work experience for learners, and of business materials as exemplars
- mentors for learners.



Assessment model

Learning aim	Key content areas	Recommended assessment approach
A Understand the preparation and professional practices required in the sales process	A1 Preparing for the sales process A2 Professional contact with customers A3 Ethical sales practices	Portfolio of evidence: <ul style="list-style-type: none"> ● pre- and post-sales customer records and CRM data ● quotation ● report exploring the relationship between these processes, successful sales and ethical sales practices.
B Explore the principles and procedures involved in completing successful selling	B1 Post-acquisition meeting processes B2 Completing a quotation B3 Post-sales monitoring and issues B4 Limits of authority	
C Review the effectiveness of techniques used to carry out sales activities	C1 Sales techniques and management C2 Measures of success C3 Reviewing personal sales performance	Portfolio of evidence: <ul style="list-style-type: none"> ● demonstration of customer-facing activities including: <ul style="list-style-type: none"> ○ sales meeting ○ post-sales customer issue meeting ● report reviewing the effectiveness of methods used in contact with customers.

Assessment guidance

This unit is internally assessed through two assignments. The first covers learning aims A and B. The second covers learning aim C. Your learners should be given the opportunity of engaging in assignments that develop and support their knowledge of selling techniques as well as utilising their generic skills.

Research activities should involve your learners using different source materials that require them to present their findings in a variety of formats such as reports, business articles and presentations. In their completed assignments, your learners should show evidence of data analysis and evaluation. This data analysis should be used to inform and justify any conclusions and recommendations that are included in the final submission.

For this unit, learners must have access to information on a range of businesses, including local, national and international organisations.

It is expected that learners in a cohort will individually select and research their choice of business organisations. Throughout the unit, learners will show individuality of thought, independent collection, collation and judgement of evidence. The business organisations selected by the learner for learning aims A, B and C should be contrasting in terms of their features; for example, ownership and liability, purpose, sector, scope and/or size.



Getting started

This gives you a starting place for one way of delivering the unit, based around the recommended assessment approach in the specification.

Unit 28: Sales Techniques and Processes

Introduction

Use the experience of learners gained through their own involvement of the sales process to highlight what they consider the characteristics and skills required by an effective salesperson.

This unit develops learners' understanding of the sales cycle, the buyer decision-making process, how to generate and qualify sales leads, how to sell by inbound and outbound telephone calls, how to sell face-to-face, how to close a sale and how to process sales orders. It is recommended that learners have access to a sales environment at some point during the unit. A call centre would be particularly useful as it would enable learners to experience at first hand the process of initiating and processing sales orders. Visits from guest speakers actively involved with generating sales, using face-to-face and telephone methods, would further encourage learners to appreciate the application of the sales cycle.

Learning aim A: Understand the preparation and professional practices required in the sales process

- Begin by introducing the aims of the unit, giving an overview of the content of the learning aims and explaining how your learners will be assessed. This will give a basis for the types of activities in which your learners will be engaged.
- Before embarking on a sale, learners must understand the importance of preparing for a sale. It is crucial salespeople get to know who their customers might be and develop an understanding of them. Learners could work in small groups and look at one small, one medium sized and one international company, and research who the customers for that company might be. They should consider the customer demographic, psychographic factors, credit worthiness, etc.
- Provide learners with case studies that have examples of customer information records. Show them how to select and examine a wide range of information key to the potential sales context.
- Use case studies to show how an effective customer relationship management (CRM) system can be used to analyse current and potential customers and enhance customer leads.
- Learners need to consider how best to contact customers professionally. You could ask a guest speaker to talk to the learners about how to engage clients in a professional and ethical way. Learners could go on to research traditional and newer methods of contacting customers. This links to what makes up a customer profile and what influences this might have on the buyer's decision-making process.
- Use video clips to show examples of good and poor sales practices. Learners could engage in role-play, taking turns to be both the salesperson and the customer to consider different strategies of engaging with potential customers. Following the role-play they could discuss the characteristics of good and ineffective sales practices.
- Video clips could be used to present examples of ethical and unethical sales practices. It would be useful to have a group discussion after watching the video clips to encourage the learners to identify what made the sales practices ethical or unethical. They could also consider why salespeople might sometimes engage in unethical practice and the legal and social implications

of this for a business.

- Learners could share their experiences of positive and negative purchase experiences they have had and take note of the characteristics behind the people that they interacted with.

Learning aim B: Explore the principles and procedures involved in completing successful selling

- A guest speaker could be invited to explain what a post-acquisition meeting involves. They should cover the processes required to move from the quotation negotiation stage through to final delivery of the product/service to the customer.
- Learners need to develop an understanding of how to complete a quotation. This could be introduced using a PowerPoint presentation, following which learners could be asked to create their own quotations for a product/service of their choice from a given set of data.
- Learners also need to understand the importance of monitoring orders through to completion, procedures for post-sales monitoring and the impact post-sales problems can have on the organisation that has sold the goods/services. Learners could think of times they have had problems after purchasing goods/services and the response they were given by a member of the after-sales team.
- Learners need to develop knowledge and understanding of how the limits of authority of an individual can impact on the sales process. For example, some senior managers may be able to offer higher discounts than junior staff members. Learners could work in small groups to consider the types of limits of authority that might exist in an organisation, the impact of these limits and the importance of complying with them.
- Provide scenarios that will allow learners to make robust and potentially innovative decisions when solving issues.

Learning aim C: Review the effectiveness of techniques used to carry out sales activities

- Learners need to review the effectiveness of techniques they have employed to carry out sales activities. They could undertake a customer-facing sales role meeting to address a customer issue. Role-play could be used alongside formal teacher input to enable learners to learn about the characteristics of face-to-face selling.
- Further practical activities could involve learners dealing with overcoming barriers to communication, closing the sale, handling payments, despatching orders and applying after-sales service. These skills could be learned through role-play in small groups. Learners could then undertake individual research looking at how different organisations go about advertising and selling their goods and services.
- You could invite a guest speaker to explain the required skills and abilities needed to be successful in the sales process from acquisition to completion.
- Once they have a firm understanding of the sales process, learners need to gain an understanding of how successful selling is measured. They should consider customer satisfaction, whether a company's targets are being reached, profit margins, etc. It could be useful for learners to visit a local business and ask them how they measure the success of their sales teams. Learners should gain an understanding of quantitative and qualitative measures of success and use given data to analyse and evaluate sales data. For example, they could analyse such data in respect of different sales regions or the performance of individual salespersons, suggesting reasons for differences in sales performance and how they could be addressed.

- Finally, learners need to be able to evaluate personal sales performances. Learners could complete a personal skills audit in which they identify their own skills against a set of skills required by those engaged in the sales process. They could then use this audit to identify how they would address any weaknesses in their skill profile.
- Group discussions could help learners to develop their knowledge and begin to argue their opinions.

Details of links to other BTEC Units and qualifications, and to other relevant units/qualifications

This unit links to:

- Unit 22: Market Research
- Unit 23: Work Experience in Business.

Resources

In addition to the resources listed below, publishers are likely to produce Pearson-endorsed textbooks that support this unit of the BTEC International Level 3 Qualifications in Business. Check the Pearson website (<http://qualifications.pearson.com/endorsed-resources>) for more information as titles achieve endorsement.

Textbooks

- Etherington, B – *Cold Calling for Chickens* (Cyan Books and Marshall Cavendish, 2006) ISBN 9781904879817
- Fleming, P – *Retail Selling*, 2nd Edition (Mercury Business Books, 2007) ISBN 9781852525545
- Wyllie, P – *The Telesales Pocketbook, Sales & Marketing* (Management Pocketbooks, 1998) ISBN: 9781870471398

Journals

B2B Marketing

Podcasts

There are many useful business podcasts online with information about sales techniques. You could start by searching 'top 10 sales podcasts'.

Videos

- TED-Ed offers a variety of relevant education videos. TED-Ed can be found by searching for 'ted ed' online.
- TED offers online videos of short, powerful talks (18 minutes or less) covering almost all topics. Search online for 'ted talks'.



Websites

- The online company Business Balls offers free career help, business training and organisational development. It can be found by searching online for 'business balls'.
- The Institute of Promotional Marketing has a useful website that can be found by searching online for 'the ipm'.

Pearson is not responsible for the content of any external internet sites. It is essential for tutors to preview each website before using it in class so as to ensure that the URL is still accurate, relevant and appropriate. We suggest that tutors bookmark useful websites and consider enabling students to access them through the school/college intranet.