

## **FM63 04 (CFAMLF18) Prepare Sales Proposals and Deliver Sales Presentations**

### **Overview**

#### **What this Unit is about**

This Unit is about preparing for sales opportunities, and includes developing proposals and sales quotations, and also the preparation of both formal and informal sales presentations. It includes identifying customer requirements, matching these with your organisation's objectives and the features and benefits of your products/services, and presenting a planned sales pitch.

#### **Who is the Unit for?**

This Unit is recommended for those involved in preparing proposals and in preparing and delivering sales presentations, but who are not necessarily sales specialists. For example, such individuals might be 'general' managers within larger organisations, or managers and/or proprietors within small to medium-sized organisations.

#### **Related specialist Units**

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB marketing Units: Sales Units *5.1. Develop Sales Proposals and Quotations*, *5.3. Develop and Deliver a Professional Sales Presentation*, and *6.4. Undertake Sales Demonstrations*. Details of these Units can be accessed via [www.msssb.org](http://www.msssb.org).

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### Performance Criteria

*You must be able to:*

- 1 Assess your customer's needs and their interest in your organisation's products/services
- 2 Ensure that your potential customer's requirements are understood fully and that all issues requiring clarification are resolved before the proposal is finalised
- 3 Establish and develop the content of the proposal in your house style, including essential information about the products/services offered, and the price, terms and conditions of sale
- 4 Provide the required level of detail, as briefed by your prospect or customer, and supply the proposal within the agreed timescales, and follow it up with an appropriate offer of further clarification and information if that is needed
- 5 Agree with your customer the length and the content of the subsequent presentation and who will be present
- 6 Identify and evaluate the most suitable audio- visual aids for effective and innovative delivery of a presentation, and the promotional material that will most complement and enhance your presentation
- 7 Ensure that your presentation includes the benefits of your products/services, relating these to your customer's needs, and follows a format designed to attract your customer's attention
- 8 Structure your presentation in a way that maximises the impact of the information and ideas within it
- 9 Ensure that any demonstration of products/services accompanying the sales presentation are prepared prior to the meeting
- 10 Anticipate problems, constraints or objections that could be raised in response to the presentation and prepare possible responses to them
- 11 Invite your audience to ask questions and to seek clarification, listening carefully to their questions and responding positively and effectively
- 12 Aim to gain commitment to progress and, if possible, close the sale

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### **Behaviours**

*You will exhibit the following behaviours:*

- 1 You are alert to verbal and non-verbal communication signals and respond to them appropriately
- 2 You present ideas and arguments clearly, concisely and convincingly
- 3 You demonstrate a thorough knowledge and understanding of your organisation's products/services

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### **Knowledge and Understanding**

*You need to know and understand:*

### **General Knowledge and Understanding**

- 1 The content and structure of effective proposals, and the points which these need to address.
- 2 How to keep the proposal customer-focused.
- 3 The range of resources and visual aids that can be used to assist in the presentation.
- 4 The potential barriers that can exist in a presentation and how to overcome them.
- 5 How to use verbal and non-verbal communications effectively in presentations.
- 6 How to show customers that you are listening to them and understand their needs and wants.
- 7 How to read buyer signals, including verbal and non-verbal cues.
- 8 The variety of questioning techniques that can be used to encourage and engage customers in the presentation.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Industry/sector specific Knowledge and Understanding**

- 1 Typical procurement practices in your industry.

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### **Knowledge and Understanding**

*You need to know and understand:*

### **Context specific Knowledge and Understanding**

- 1 Details of the products/services being offered by your organisation.
- 2 Your customer's requirements and how these relate to your products/services.
- 3 Your organisation's procedures for proposal development and submission.
- 4 The information underpinning the submission of the proposal including factors relating to pricing strategies and payment arrangements.
- 5 Sales literature and promotional offers that are complementary to the presentation and will assist in securing the sale.
- 6 Testimonials from satisfied customers that can be used in your presentation.

### **Evidence Requirements**

*To achieve this Unit you will need to ensure that your evidence covers all Performance Criteria, behaviours and Knowledge and Understanding.*

The following table provides you with possible examples of evidence.

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### Evidence Requirements

PC	Evidence of Performance Criteria: ♦ possible examples of evidence	Behaviours	Knowledge and Understanding		
			General	Industry specific	Context specific
<b>Activities you have participated in and actions you have taken to prepare sales proposals</b>					
PC1	♦ e-mails, notes of meetings etc. with potential customers to identify their requirements	2, 3	2, 6, 7	1	
PC2	♦ sale proposal brief agreed with customer	3	1, 6, 7	1	
PC3	♦ sales proposal and any accompanying notes and documents	2,3	1, 6, 7	1	
PC4					
	♦ personal statements (reflections on your own actions to prepare a sales proposal)	2,3	1,2, 6, 7	1	
<b>Activities you have participated in and actions you have taken to deliver sales presentations</b>					
PC5	♦ your sales presentation and any accompanying notes, including ones on length and content of presentation	2, 3	4, 5	1	
PC6	♦ audio-visual aids and notes or other evidence of demonstrations used in your presentation, including comments on reasons for your choice	2,3	3,4,5		
PC7					
PC8	♦ e-mails or other communications from customers at the presentation on their reaction to it	1,2,3	4,5,6,7,8		
PC9					
PC10	♦ personal statements (reflections on your own actions to prepare a sales proposal)	1,2,3	3,4,5,6,7,8	1	
PC11	♦ witness statements (comments from others on structure of presentation, responses to questions, dealing with any constraints or objections, use of audio-visual aids and demonstrations, gaining commitment)	1,2,3	4,5,6,7,8	1	
PC12					





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**Notes/Comments**

The candidate has satisfied the assessor and internal verifier that the performance evidence has been met.

**Candidate's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Assessor's signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Internal verifier's signature** \_\_\_\_\_ **Date** \_\_\_\_\_