

## **SALES – IDENTIFY NEW POTENTIAL AND EXISTING BUSINESS**

**US252193 / NQF 4 / 4 Credits**

*Information is a source of learning. But unless it is organised, processed, and available to the right people in a format for decision making, it is a burden, not a benefit.*

- William Pollard

Information about existing customers and potential customers forms the base of sales – remember, not all customers are the same - there is no “one size fits all”. This course delves into the benefits of understanding your marketing database and the gold mine of prospects that accompany it. With today’s ever changing needs and wants, it has never been more important to collect and record customer data accurately, identify customers systematically, and know the difference between a customer and a prospect.

### **WHO SHOULD ATTEND**

- All staff in a sales environment
- Sales Executives
- Sales Managers, Operations Managers and Account Managers
- Business Owners
- Anyone wanting to start their own business

### **HOW YOU WILL BENEFIT**

- Target your prospects more effectively by adapting to consumer needs through accurate information
- Increase your success rate by identifying “ideal customers”
- Reduce unnecessary time and costs on pursuing non-customers
- Improve customer relationships - making them feel valued
- Get organised – learning the essentials data collection and recording - assessing customer profiles turns quantity into quality

### **WHAT WILL BE COVERED**

- The fuel which drives the business – understanding the importance of accurate customer information and what this information can do for your company with regards to successful selling
  - The difference between customers and prospects
  - Methods and techniques for identifying customers
  - Primary internal and external sources of prospects and customers Completion of contact reports as required by your company
- The marketing database – where to store the valuable material of your customer relationships
  - Defining a marketing database
  - Various types of customer information required for developing a database
  - Explaining the need for a marketing database
- Asking the right questions of your internal sales force and applying the answers practically to break down your database proficiently

*PTO For Table of Contents*

One Day Course  
8:30am – 4:00pm

Refreshments and a light, finger lunch will be served at our public course  
[sales@kznbtc.co.za](mailto:sales@kznbtc.co.za) or (031) 267 1229 for bookings and further information

- The 6 customer “types” and where they fit into the customer hierarchy
  - Identify customers through internal consultation
  - How to formulate prospect profiles and how to assess them
  - Identify prospects externally and methods of sourcing their details
  - Segmentation of external dates
  - Matching product or service to needs
  - Qualifying prospects
- Collecting and recording customer information– preparation, policies, procedures

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| <b>Module 1</b><br><b>Understand the importance of accurate customer information</b>   | <b>Module 2</b><br><b>Understand the marketing database</b>  |
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| <ul style="list-style-type: none"> <li>• Explain the difference between customers and prospects with examples</li> <li>• Identify the primary internal and external sources of prospects and customers according to generally accepted principles</li> <li>• Explain the importance to the organisation of identifying the right prospects with specific reference to the organisation's products and/or services</li> <li>• Explain the importance of gathering and capturing accurate customer information in terms of developing future customer relationships</li> </ul> | <ul style="list-style-type: none"> <li>• Define and explain a marketing database in generally accepted terms</li> <li>• Identify and explain the various types of customer information required for the development of a marketing database in terms of their marketing applications</li> <li>• Explain the need for a marketing database in terms of the modern consumer's demand for personalised service</li> </ul> |

| <b>Module 3</b><br><b>Identify prospective and existing customers</b>   | <b>Module 4</b><br><b>Collect customer information</b>   |
|---|--|
| <ul style="list-style-type: none"> <li>• Identify customers internally through consultation with the sales force and the information technology department</li> <li>• Formulate prospect profiles based on existing customer descriptors</li> <li>• Identify prospects externally by applying the profiles developed and also through segmentation processes and the matching of product and/or service benefits to consumer needs</li> <li>• Explain methods of sourcing prospects' contact details according to established practice</li> <li>• Qualify prospects according to prospect profiles</li> </ul> | <ul style="list-style-type: none"> <li>• Collect and record customer data in accordance with the data fields required for each customer file on the marketing database</li> <li>• Check customer data for accuracy against the organisation's data-capture criteria</li> </ul> |