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### Overview

This unit is about building and maintaining effective sales relationships with your organisation's customers. It includes understanding your customers' requirements from their suppliers, and managing all selling and related interfaces with your customers to ensure effective customer management.

#### Who this unit is for

This unit is recommended for those responsible for developing and managing relationships with an organisation's customers, but who may not necessarily be marketing or 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 units:

#### Sales units

1. Build and retain effective sales relationships
2. Devise sales strategies to suit procurement practices of key customers
3. Monitor and control relationship management activities

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:*
- P1 identify and evaluate the criteria which your key customers use when selecting their suppliers, and the impact of such criteria upon your customer's procurement practices
  - P2 identify and prioritise customers with whom you want to build effective sales relationships
  - P3 establish existing and potential customer needs and expectations, and balance them with your organisation's sales strategy
  - P4 ensure that your organisation's products/services are matched clearly to customer needs and expectations
  - P5 identify opportunities to develop the relationship with your customer
  - P6 set up procedures and processes to support the monitoring and control of product/service support, in agreement with key customers
  - P7 seek and collect customer feedback about your organisation's provision of products/ services, to ensure that the required quality and consistency of service is being maintained
  - P8 identify key strengths and weaknesses of the relationship, and activities designed to build on the strengths and to address weaknesses
  - P9 deal with customer complaints or problems and provide suitable sales solutions
  - P10 monitor and evaluate relationships with customers on a regular basis
  - P11 maintain up to date details of your customers, including a record of contacts and transactions made

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### Knowledge and understanding

*You need to know and understand:*

#### **General knowledge and understanding**

- K1 how to identify and prioritise effectively customers with whom your organisation should be building long-term and profitable relationships
- K2 how to communicate with key customers effectively in order to develop trust, commitment and co-operation
- K3 how to negotiate effectively with customers to establish a mutually beneficial financial outcome from the relationship
- K4 methods for monitoring and evaluating customer relationships
- K5 principal methods and processes for obtaining customer feedback
- K6 Ways of influencing others to respond to customer feedback and improve levels of service
- K7 the importance of maintaining up to date records of customer contact details, and of transactions made

*You need to know and understand:*

#### **Industry/sector specific knowledge and understanding**

- K8 legal, ethical and corporate social responsibility requirements for customer relationships in your sector

*You need to know and understand:*

#### **Context specific knowledge and understanding**

- K9 the focus of the sales plans, targets and sales objectives
- K10 the contribution that customer relationships make to the achievement of your organisation's aims
- K11 your organisation's practices relating to monitoring and controlling key customer activities
- K12 methods for managing sales support and customer service improvements
- K13 the limits of your authority in relation to managing a customer relationship

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### Additional Information

#### Behaviours

1. You seek to improve performance continuously
2. You accept criticism of your organisation and are proactive in providing solutions
3. You influence colleagues to improve customer service as a result of monitoring and control activities
4. You demonstrate integrity and ethical behaviour at all times

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**Original URN** S18

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**Relevant occupations** Agriculture, Horticulture and Animal Care; Business, Administration and Law; Information and Communication Technology; Arts, Media and Publishing; Health, Public Services and Care; Medicine and Dentistry; Nursing and Subjects and Vocations Allie; Health and Social Care; Public Services; Child Development and Well Being; Agriculture; Horticulture and forestry; Animal care and veterinary science; Environmental conservation; Professional Occupations; Managers and Senior Officials; Information and Communication Technology; Research Professionals; Librarians and Related Professionals; Engineering Professionals; Science Professionals; Database Administration; Software Development; Systems Support; Local Area Archives; Microfilm and Microfiche Technician; Associate Professionals and Technical Occupations; Corporate Managers and Senior Officials; Microsoft Certified Professional; Application Support; Business Analyst; Managers and Proprietors in Hospitality ; ICT for practitioners; ICT for users; Science and mathematics; Science; Mathematics and statistics; Engineering and manufacturing technologies; Engineering; Manufacturing technologies; Transportation operations and maintenance; Construction, planning and the built environment; Architecture; Building and construction; Urban, rural and regional planning; Retail and commercial enterprise; Retailing and wholesaling; Warehouse and distribution; Service enterprises; Hospitality and catering; Leisure, travel and tourism; Sport, leisure and recreation; Travel and tourism; Performing Arts; Crafts, creative arts and design; Media and communication; Publishing and information services; History, philosophy and theology; History; Archaeology and archaeological sciences; Philosophy; Theology and religious studies; Social sciences; Geography; Sociology and social policy; Politics; Economics;

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Anthropology; Language, literature and culture; Languages, literature and culture of the; Other languages, literature and culture; Linguistics; Education and training; Teaching and lecturing; Direct learning support; Preparation for life and work; Foundations for learning and life; Preparation for work; Accounting and finance; Administration; Business management; Marketing and sales; Law and legal services; Production Managers; Functional Managers; Quality and Customer Care Managers; Financial Institution and Office Manager; Managers in Distribution, Storage and Re; Protective Service Officers; Health and Social Services Officers; Managers in Farming, Horticulture, Forest; Managers and Proprietors In Other Services; Health Professionals; Teaching Professionals; Legal Professionals; Business and Statistical Professionals; Architects, Town Planners and Surveyors; Public Service Professionals; Science and Engineering Technicians; Draught persons and Building Inspectors; IT Service Delivery Occupations; Health Associate Professionals; Therapists; Social Welfare Associate Professionals; Protective Service Occupations; Artistic and Literary Occupations; Design Associate Professionals; Media Associate Professionals; Sports and Fitness Occupations; Administration and Secretarial Occupations; Government and Related Organisations; Finance; Records; Communications; General; Secretarial and Related Occupations; Skilled Trades Occupations; Skilled Agricultural Trades; Metal Forming, Welding and Related Trade; Metal Machining, Fitting and Instrument ; Vehicle Trades; Electrical Trades; Construction Trades; Building Trades; Textile and Garment Trades; Printing Trades; Food Preparation Trades; Skilled Trades NEC; Personal Service Occupations; Healthcare and Related Personal Services; Childcare and Related Personal Services; Animal Care Services; Leisure and Travel Service Occupations; Hairdressers and Related Occupations; Housekeeping Occupations; Personal Services Occupations NEC; Sales and Customer Services Occupations; Sales Assistants and Retail Cashiers; Sales Related Occupations; Customer Service Occupations; Process, Plant and Machine Operatives; Process Operatives; Plant and Machine Operatives; Assemblers and Routine Operatives; Construction Operatives; Transport Drivers and Operatives; Mobile Machine Drivers and Operatives; Elementary Occupations; Elementary Agricultural Occupations; Elementary Construction Occupations; Elementary Process Plant Occupations; Elementary Goods Storage Occupations; Elementary Administration Occupations; Elementary Personal Services Occupations; Elementary Cleaning Occupations; Elementary Security Occupations; Elementary Sales Occupations; Transport Associate Professionals; Legal Associate Professionals; Business and Finance Associate Professionals; Sales and Related Associate Professional; Conservation Associate Professionals; Public Service and Other Associate Professionals

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### Suite

Marketing and Sales Standards for non-specialists

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### Key words

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