

# SALES PROCESS

DOCUMENT NUMBER : MP01 SALES

ISSUE NUMBER : 02

DATE: 14<sup>TH</sup> MAY 2019

## Responsibility:

Sales Director

## Physical Resources Hardware/Software:

- Desk, chair etc.
- Computer/ scanner/printer
- Microsoft Office suite
- Binder machine
- Web site
- Promotional materials/brochures
- Transport
- Company Mobiles

## Documents and Records

- Incoming sales leads report
- 6 monthly order forecast report
- Order Form
- Site Survey and Machine specification
- Machine Invoice
- Leasing documents
- Refurbished machines stock list
- Brochures
- Mailshots
- Contracts
- All Email Correspondence
- Proposal and any notes or figures attached

## Competence Training and Awareness

- Sales Training
- Sales skills/experience
- Good telephone manner/skills
- Language skills
- Product knowledge – Manufacturer training provided continuously
- Lease Training

## Inputs:

### Enquires come from

- Phone
- e-mails
- Field visits
- Website enquiries
- References

## Outputs

- Confirmed orders
- Completed CVS Order Form
- Agreed Installation date
- Completed Lease Document
- Completed Direct Debit

## Objectives:

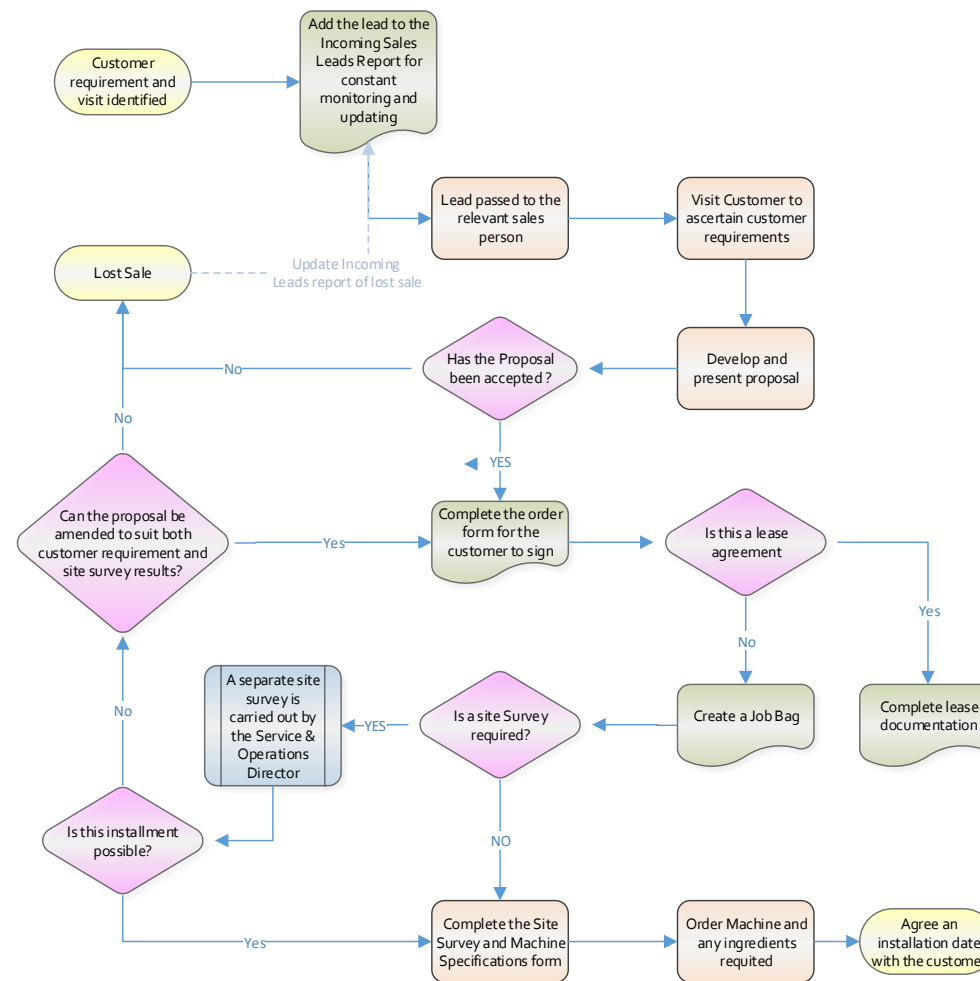
- Accurately establish the client's requirements and meeting their requirements in terms of Equipment type, price, quality and availability
- Meet Internal sales targets

## Quality Control:

- Proposals are thoroughly checked before they are presented to the customer, this can be done by the Sales Director if thought necessary
- All Sales leads are constantly monitored by the Sales Director and debriefed with the relevant sales person on a monthly basis or sooner if required
- With all new customers, the sales person will accompany the engineer on installation

## Processes/Procedures/Activities:

- Allocate Sales enquiry to the relevant sales person
- Add the sales lead to the Incoming sales leads report
- Contact the customer to arrange a suitable date for visit
- Site visit to ascertain the customer requirements
- Develop the proposal
- Present the proposal to the customer
- Obtain the order and complete the order form/s for customer to sign
- Create a job bag (This is a file specific to the customer containing all documents and correspondence received and sent)
- Arrange for a Site Survey if it is felt necessary by the sales person. This is carried out by the Service Manager/Ops Director
- Complete a site survey and machine specification form and forward this onto the workshop for preparation and building. If there are any ingredients that are required to be ordered then this form needs to be forwarded to Warehouse Manager
- Vending machine is ordered or in the case of refurbished machines this is allocated by Office Administrator
- Installation date agreed with customer



## Health & Safety Aspects

- Reduce accidents
- Report near misses/dangerous occurrences
- Be aware of General Office Safety
- Display Screen Equipment Risk Assessments
- Attend company H&S meetings
- COSHH assessments
- Manual handling

## Environmental Aspects

- Reduce paper/toner use
- Recycle paper
- Reduce electricity consumption by turning off computer/lights

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