

UNDERSTAND
INDUSTRY

ASSESS
CUSTOMER NEEDS

EDUCATE CUSTOMER

PREPARE FOR SELLING

CLOSE SALE

GATHER & USE
INFORMATION

SOLVE PROBLEMS

MAKE DECISIONS

LEAD OTHERS

WORK IN TEAMS

APPLY TECHNOLOGY

ORGANIZE & PLAN

BUILD CONSENSUS

SET GOALS

Customer Service and Sales Skill Standards



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Notice

The Sales & Service Voluntary Partnership, Inc. is pleased to release these customer service and sales skill standards for review. The standards contained in this document are the result of more than two years of research about entry-level through first-line supervisory work in the retail, wholesale, personal services, and real estate industries.

The partnership requests input from all parties on the standards. Please send comments to:

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Learns About Products or Services

Key Activity 1.1

Performance Indicators

Undergoes company provided training to support product or services as well as follow-up training.

- ▶ Attendance records show that employee has participated in required training.
- ▶ Documentation (e.g., test results, checklists, instructor or manager evaluations) indicates satisfactory performance in training.
- ▶ Training assignments (e.g., homework or participation in role plays) are completed satisfactorily and on time.
- ▶ Employee has mastered techniques to efficiently access additional information or training (e.g., reference manuals, supervisors, co-workers or the Internet) if needed and if available.
- ▶ Employee demonstrates understanding of skills being taught (e.g., role playing, sign-off by manager, responses to clarifying questions or other observable behaviors).

Key Activity 1.2

Reviews and comprehends written and multimedia material pertaining to products or services produced by employee's company or trade organization.

- ▶ Clear and accurate verbal explanations of company, industry, manufacturer, or supplier products and services are given when answering questions, including providing sufficient information to meet regulatory requirements, if necessary.
- ▶ Relevant sources of information (e.g., articles in trade magazines, popular media, company policy manuals or guidelines) are cited to clarify or strengthen points.

Key Activity 1.3

Tests and samples products or services.

- ▶ Demonstrations of products or services for customers are performed competently, knowledgeably, and safely.
- ▶ Descriptions of products and services include comparative information on alternative products or services based on testing and sampling.
- ▶ Demonstrations and explanations of product reflect a full understanding of all relevant features of the product or service.
- ▶ Demonstrations and explanations of features of products or services reflect appropriateness to specific customer needs.

Key Activity 1.4

Studies competitors' products or services, including competitors' marketing materials (ads, fliers, TV commercials, web pages, etc.).

- ▶ A description of competitors' products and services, including pricing structure, is provided in response to questions from customers.
- ▶ Sales presentations and answers to customer questions demonstrate knowledge of advantages and disadvantages of own company's products and services compared to those of competitors.
- ▶ Sales presentations and answers to customer questions demonstrate knowledge of which products or services offered by company are comparable to those offered by competitors.
- ▶ Description of why company's products or services are better than those of competitors is provided when relevant.

Assesses Customer Needs

Key Activity 2.1

Performance Indicators

Addresses the customer, either in person, by telephone, e-mail or other means.

- ▶ Customer receives prompt greeting or acknowledgment.
- ▶ Customer promptly receives an offer of assistance (e.g., How can I help you?).
- ▶ Customer receives courteous, professional treatment throughout the interaction.

Key Activity 2.2

Gathers information about customer's needs, and customer's knowledge of products or services.

- ▶ Customer's objectives, desires, and problems that relate to the product or service are identified.
- ▶ Information on how the customer plans to use the product or service is collected.
- ▶ Outdated and inaccurate information or impressions related to the company's product or service are identified, as needed.
- ▶ Information is gathered in a courteous, professional manner.
- ▶ The most efficient interviewing technique is selected and used when gathering information from customers (e.g., open- vs. close-ended questions, knowing when to use follow-up questions).
- ▶ Approach is tailored to meet the needs of customers with different demographic characteristics (e.g., age, cultural background, disability status) and personalities.

Key Activity 2.3

Responds to customer's comments and questions.

- ▶ Courteous, complete attention is provided to customer.
- ▶ Customer's request for an advertised item results in prompt offer to sell the item.
- ▶ Customer's comments, questions, concerns, and objections are welcomed and are addressed with clear, direct, accurate and timely responses.
- ▶ Customer needs and objectives are clarified and re-confirmed (e.g., restated back to the customer) if necessary.

Key Activity 2.4

Determines customer's price considerations.

- ▶ Customer is questioned clearly and courteously about price range considerations.
- ▶ Customer's approximate desired price range is correctly ascertained.
- ▶ Customer is presented with products of varying price ranges to gauge specific price limits.

Educates Customer

Key Activity 3.1

Performance Indicators

Explains and demonstrates products or services and prices to customer.

- ▶ Clear and complete explanations and demonstrations of products or services are provided to customers.
- ▶ Information about the complete array of products or services that will meet each customer's specific needs is provided.
- ▶ Information about other products or services that are necessary or desirable to complement the sale is offered (e.g., accessories that match a clothing selection, conditioner with shampoo, house warranty with home purchase).
- ▶ Accurate pricing information, including payment options, is provided to customers.
- ▶ When necessary and relevant, information about which products or services are on sale is provided to customers.
- ▶ Information about the rationale for product or service prices (e.g., higher-priced products or services include additional features) and about the comparative advantages and disadvantages of differently priced offerings is provided to customers when appropriate.

Key Activity 3.2

Identifies alternative or additional products, services, and/or options available.

- ▶ Customers are provided with alternatives if advertised product or service is unavailable (e.g., rain checks when specified in the advertisement or information about when product or service may be available again).
- ▶ If requested products or services are not available, information about equivalent or alternative company offerings is provided to customers (within company policy).
- ▶ If customer needs cannot be met by company products or services, information about other companies' products or services that will meet those needs is provided (within company policy).

Key Activity 3.3

Informs customer about service policies (returns, warranties, guarantees, service plans).

- ▶ Complete and accurate information about service policies (e.g., return policies, warranties, guarantees, and service plans) is provided to customers in response to questions and when required by company policy.
- ▶ Complete and accurate information about Federal and State rules pertaining to warranties, guarantees and returns is provided when necessary.
- ▶ Complete and accurate information about inclusive or optional service plans is provided when appropriate.
- ▶ Accurate information is provided about expiration dates for warranties and service plans.

Key Activity 3.4

Solicits supervisor or co-worker support and advice when necessary to meet customer needs.

- ▶ Requests to supervisor or co-worker for support and advice are clear, concise and timely and include all relevant, available information concerning the customer and the product or service.
- ▶ When additional support or advice is required, a clear explanation is provided to the customer of how and when he or she will be re-contacted.

Meets Customer's Needs And Provides Ongoing Support

Key Activity 4.1

Performance Indicators

Coordinates as needed with other services to expedite delivery of service or product.

- ▶ Accurate information about when product will be delivered is communicated to customers.
- ▶ Delivery records indicate that the necessary arrangements were made with other individuals or services to ensure accurate and timely delivery.
- ▶ Information, including accurate order numbers and properly-completed paperwork, is provided to customer to enable them to check on status of delivery.

Key Activity 4.2

Contacts customer to determine if products or services meet customer's expectations.

- ▶ Customer receives timely follow-up inquiry to determine whether products or services met customer's expectations.
- ▶ Customer follow-up responses are documented according to company policy.
- ▶ Noteworthy or significant customer feedback is conveyed immediately to supervisors or other relevant individuals and departments.

Key Activity 4.3

If customer's expectations are not met, informs the customer of how the company will satisfy the customer's needs and facilitates resolution process.

- ▶ Customer receives clear and accurate information regarding company's process and policies for resolving customer complaints and problems.
- ▶ Problem is resolved appropriately and in a timely manner, according to company's process and policies.
- ▶ Customer feedback indicates satisfaction with employee actions and behavior.

Prepares For Selling

Key Activity 5.1

Performance Indicators

Reviews and understands future sales goals and how they are based on current and past performance.

- ▶ Sales quotas prepared, based on past and current sales goals, activities, advertising and promotions and other relevant information about company and/or store goals.
- ▶ Group sales performance reviewed and evaluated according to company policies and procedures for measuring and tracking sales goals.
- ▶ Individual sales performance reviewed and evaluated according to company policies and procedures for measuring and tracking sales goals.

Key Activity 5.2

Develops and implements strategy for selling products or services.

- ▶ Strategy identifies specific actions to increase sales.
- ▶ Strategy identifies sales quotas or financial goals for specific products or services.
- ▶ Strategy for meeting sales or financial goals is implemented according to company goals and plans.
- ▶ Strategy implemented makes effective use of available resources.
- ▶ Sales performance meets company/individual goals.
- ▶ Sales strategy is continually revised, based on sales experiences, to maximize likelihood of sales.

Key Activity 5.3

Familiarizes self with pricing strategies and policies.

- ▶ Company pricing strategies, policies, and current prices, as well as sources for that information, are described accurately.
- ▶ Changes in prices, and pricing strategies and policies (e.g., price increases, sales, etc.), are learned in a timely manner.
- ▶ Sales presentation and answers to customer questions demonstrate knowledge of pricing policies (e.g., policy on price adjustments).
- ▶ Sales presentation and answers to customer questions demonstrate knowledge of how pricing translates to customer value.

Key Activity 5.4

Identifies and prioritizes potential customers within market target area.

- ▶ Customer information, including information relevant to increasing potential customers, is maintained according to company policy.
- ▶ Customer information is evaluated in order to prioritize customers and enhance sales performance.
- ▶ Sales prospects are prioritized in a way that is consistent with company and/or store sales strategies.
- ▶ Potential new customers are identified through walk-ins and referrals (including other customers, associates, friends).
- ▶ New and old customers contacted, and resulting information incorporated into customer information database.

Gains Customer Commitment And Closes Sale

Key Activity 6.1

Performance Indicators

Observes customer for verbal or body language signs indicating that he or she is ready to complete the sale.

- ▶ Judgments about whether a customer is ready to complete a sale are accurate.
- ▶ Determinations that customers will definitely not make a purchase are accurate.
- ▶ Judgments about customer intentions (e.g., whether they are ready to complete a sale, whether they will definitely not make a purchase) take both verbal signals and body language into consideration.

Key Activity 6.2

Engages in negotiation process.

- ▶ An accurate and clear explanation of company policies regarding negotiations (e.g., whether negotiations are permitted and under what circumstances) is provided to customer when necessary.
- ▶ Customer receives courteous treatment throughout negotiation.
- ▶ Responses to customer statements and questions during negotiations are accurate and relevant.
- ▶ Points of customer confusion, misunderstanding and resistance are accurately identified, and attempts are made to address these obstacles in order to complete the sale.
- ▶ Customer receives discount or other conditions favorable to the customer (within company guidelines), in order to complete the sale.
- ▶ Customer is treated courteously and encouraged to shop again with the company, if the negotiation is unsuccessful.

Key Activity 6.3

Closes and confirms sale with customer.

- ▶ Suggestion to complete the sale is made at appropriate time.
- ▶ Customer receives all available information (including written material, phone numbers, or Internet addresses) on how to properly and safely use the product (including cleaning and maintenance).
- ▶ All steps in the sales transaction are completed accurately.
- ▶ All paperwork is completed accurately and submitted in a timely manner.

Key Activity 6.4

Discusses specifics of the sale (delivery and/or installation date, warranties, product protection plan).

- ▶ Complete and accurate information about the specifics of the sale is provided to the customer.
- ▶ Complete and accurate information in response to questions about Federal and State laws and regulations pertaining to warranties, guarantees, and returns is provided to customers.
- ▶ Explanations provided to customer are clear.

Key Activity 6.5

Handles sales transaction.

- ▶ Proper equipment is selected and used proficiently to process transaction.
- ▶ All components of the transactions are accurately performed, including rain checks, warranty charges, taxes, and discounts.
- ▶ Clear, complete, and accurate explanations of all components of the transaction are provided to customer.
- ▶ The correct amount of change is provided to customers.
- ▶ Clear, complete and accurate explanations of company policies regarding payment (e.g., personal checks, credit cards, etc.) are provided to customers.
- ▶ Transaction is correctly documented and receipt provided to customer.
- ▶ Merchandise is properly handled for the customer (e.g., remove ink tags, provide boxes, bags).
- ▶ Customer receives a gesture of appreciation (e.g., thank you, complimentary gift, invitation to come back soon).

Develops And Implements A Sales Follow-Up Plan

Key Activity 7.1

Performance Indicators

Follows up with customers regarding suggestions for future purchases.

- ▶ Suggestions for future purchases, including information on products or services that complement past purchases as well as information on new products or services, is provided to customers.
- ▶ Customer follow-up conforms to company policy.
- ▶ Customer is contacted in a timely fashion.
- ▶ Customer receives courteous treatment throughout follow-up.

Key Activity 7.2

Maintains contact with customers through correspondence, phone calls and casual contacts in community.

- ▶ Up-to-date and accurate customer information database is maintained.
- ▶ Contacts are professional and appropriate.
- ▶ Contacts are routinely conducted.
- ▶ Information obtained from customer contacts (e.g., suggested changes to sales procedures, satisfaction with products or services, complaints about products or services) is documented.

Key Activity 7.3

Converts returns to exchanges

- ▶ Customer concerns are addressed courteously and in accordance with company policy.
- ▶ Options available to customer for resolving concerns are described.
- ▶ Suggestions for more suitable products or services are provided to customer.
- ▶ Proportion of customers with exchanges rather than returns increases.
- ▶ Warranty and return policies are implemented according to company policies.

Key Activity 7.4

Analyzes and evaluates the effectiveness of prospecting methods, sales strategies, and marketing/merchandising plans, and makes any necessary adjustments.

- ▶ Routine analyses are conducted of the effectiveness of prospecting methods, sales strategies, and marketing/merchandising plans, using customer information database, sales data, and any other relevant information.
- ▶ Actual problems, potential problems, and potential for improvements are identified.
- ▶ Review and revision of prospecting methods, sales strategies, and marketing or merchandising are conducted regularly.
- ▶ Adjustments to prospecting methods, sales strategies, and/or marketing/merchandising plans are clearly connected to analyses performed and identification of problems and potential improvements.
- ▶ Increased sales directly result from changes to prospecting methods, sales strategies or marketing/merchandising plans.