TOURISM INFRASTRUCTURE AND ENTERPRISE ZONE AUTHORITY

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FOR	:	JETRO NICOLAS F. LOZADA Assistant Chief Operating Officer Assets Management Sector
FROM	:	THE MANAGER Business Development Department
SUBJECT	:	WORK INSTRUCTION on the SALES CALL PROCEDURE
DATE	:	January 22, 2020

To complete the documentation of the processes of the Sales Division, we have prepared the work instruction of the Sales Call Procedure. This process will provide our present and future staff a step by step process on how to effectively conduct a sales call to prospective clients. This will likewise develop their marketing and selling skills.

For your consideration and approval, Sir.

Thank you.

MEAFrancisco
MA. EVELYNE A. FRANCISCO

A. Scope

This applies to the sales call procedure which includes the promotion and sales presentation on the TIEZA Operating Properties. The sales call is the actual selling activity and involves oral conversation between seller and buyer for the purpose of generating sales.

Sales call is one of the promotional methods by which the Junior Account Executive, Account Executive and Account Manager use their skills and abilities in an attempt to close a sale.

B. Details

Responsible	Activity	Interface
Marketing Analyst Marketing Specialist Supervising Marketing Specialist	Start	
	Sales Planning/Prospecting Stage Look for leads by identifying potential customer and client from the public and private sectors such as: government agencies, local government units (LGUs), tour operators, travel agencies, tourism and corporate associations, private organizations; academe	Detail 1
	Pre-approach Stage Research on the account prior to the call as well as gather info about the person or company prior to the meeting	Detail 2
	Prepare all collateral materials. such as flyers, brochures, tariff card, rate sheet, contracted rates conforme corporate giveaways and powerpoint presentation matls. Set an appointment	Detail 3
	The Approach Stage Introduce oneself and the company you represent.	Detail 4
	A	

Responsible	Activity	Interface
	A	
Marketing Analyst Marketing Specialist Supervising Marketing Specialist	**The Needs Assessment Stage** Ask questions to help determine what best suits clients' requirements to include specific need as well as to establish the process the potential client normally go through when considering a new service provider	Detail 5
	Sales Presentation Present a visual description or video of the property/product/services. Focus on the benefits aligned to the sales account's needs and requirements, rather than the features	Detail 6
	Handling Objections and/or Negotiations	Detail 7
	Closing Stage Clarify the details of the account, client needs, special requirements, expense and terms and conditions as well as other relevant details; Confirm and arrive at mutual agreement; Close the sale with a signed conforme. Contract to be delivered personally as soon as it has been completed	Detail 8
	Customer Maintenance Email/Write a thank you letter for giving you the opportunity to meet with him and make a presentation and/or to do business with him. Establish a follow up call and customer visit. It is best to keep connected with potential clients for repeat business	Detail 9
	Sales Call Report (SCR) Prepare and submit SCR for all sales calls conducted as a guide in following up, monitoring and establishing Customer Relationship Marketing (CRM)	Detail 10
	END	

Sales Presentation
Present a visual description or video of property/product/services. Focus on the be aligned to the sales account's needs requirements, rather than the features

C. Narrative

1. Sales Planning/Prospecting Stage

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) look for leads by identifying potential customer and client from the public and private sector such as: government agencies, local government units (LGUs); tour operators, travel agencies, tourism and corporate associations, private organizations; academe.

2. Pre-Approach Stage

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) conduct research on the accounts prior to the call in order to learn something about the potential client and their business before the meeting. The information gathered may be used to start the business conversation and get the attention of the prospective client.

3. The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) prepare all marketing collaterals such as flyers, brochures, tariff card/rate sheet, contracted rates conforme, corporate giveaways and powerpoint presentation materials.

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) set an appointment with the potential client.

4. The Approach Stage

This is the stage where the Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) make an introduction of themselves and the company they represent by making a short presentation of the properties and services they are promoting and selling.

5.The Need Assessment Stage

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) ask open questions to help determine how to better understand the prospect's requirements. These are the questions that start with 1-H and 4Ws – *How, When, Where, Why and What*. These open questions keep the business talk going.

Asking good questions will not only help the Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) determine what will best suit the prospects needs, as well as to establish confidence, trust, and very often help the prospective client consider issues that may never have thought of. This stage will provide an opportunity to showcase features, and based on the prospects answers will led to finding out the client's need to focus on.

6. Sales Presentation

This is the highlight of the meeting as the Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) present a visual description or video of the property/ product/services being offered as well as to establish the benefits of the business proposition for Travel Agencies and Tour Operators.

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) should focus on benefits aligned to the sales account's needs and requirements rather than features in the sales presentation and illustrate how your product or service is different and better than other competitors to convince your client in closing the sale.

7. Handling Objections and/or Negotiations

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) should anticipate objections. Here are some tips:

Practice active listening
Repeat back what you hear
Validate your prospect's concerns
Ask follow-up questions
Leverage social proof
Set a specific date and time to follow-up

8. Closing Stage

This is the stage where the Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) confirm the client's understanding of the presentation. They need to :

a. Clarify the details of the account, client needs, special requirements, expense and terms and conditions as well as other relevant details.
b. Confirm and arrive at a mutual agreement
c. Close the sale with a signed conforme. Contract to be delivered personally as soon as it has been completed

9. Customer Maintenance

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account Manager) email/write a thank you letter for giving you the opportunity to meet with him and make a presentation and/or to do business with him,

Establish a follow up call and customer visit. It is best to keep connected with potential clients for repeat business.

10.Sales Call Report

The Marketing Analyst (Junior Account Executive), Marketing Specialist (Account Executive) and Supervising Marketing Specialist (Account

Manager) prepares and submit the sales call report for all sales calls conducted as a guide in following up, monitoring and establishing Customer Relationship Marketing (CRM)

D. Forms

Thank you Letter

Sales Call Report

Reviewed by

MA. EVELYNE A. FRANCISCO
Manager
Business Development Department

Approved by:

JETRO NICOLAS F. LOZADA
Assistant Chief Operating Officer
Assets Management Sector