Document - Template Name	6.1.3 MG-SLS-PRO 202404.04
Previous Name, if changed	6.1.3 MG-SLS-PRO 202404.03
Description	MG SALES PROCEDURE
Revision No	VERSION 024
Date of Revision	01 JULY 2024
Date of Next Revision	01 JULY 2026

Document Name:
6.1.3 MG-SLS-PRO 202407.04 MG SALES PROCEDURE 010724

Version:
04

Date:
01 JULY 2024

Author:
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MACROCOMM GROUP SALES PROCEDURE

Document Control

Name	Version	Date	Changes
6.1.3 MG-SLS-PRO 202404.00 MG SALES PROCEDURE	Original (00)	18 APR 24	n/a
6.1.3 MG-SLS-PRO 202404.01 MG SALES PROCEDURE	Version 01	18 JUN 24	Updated Inputs and Outputs
6.1.3 MG-SLS-PRO 202404.02 MG SALES PROCEDURE	Version 02	20 JUN 24	Risks updated
6.1.3 MG-SLS-PRO 202404.03 MG SALES PROCEDURE	Version 03	21 JUN 24	Process Diagram added
6.1.3 MG-SLS-PRO 202404.04 MG SALES PROCEDURE	Version 04	01 JUL 24	Removed commission as part of HR Remuneration Policy

Document Sign-Off / Approval

This is the formal sign-off for the Sales Procedure.

Name	Designation	Date	Signature
Elton Chettiar	Chief Operating Officer – Macrocomm Group		
Ikeraam Davis	Managing Executive Macrocomm Group: Smart Solutions Sales		
Ashok Sooklall	Procurement Manager Macrocomm Group		
Kumaran Govender	Financial Manager Macrocomm Group		

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1 Procedure Description and Purpose

The purpose of this Sales procedure is to enable the Sales Department to grow sales and work effectively with Procurement and Finance to streamline their customer onboarding and ordering process in their pursuit of their sales targets.

1.1 Description

This is the standard procedure for the sales team to follow to grow their pipeline, onboard new customers, and place orders for fulfilment and to meet their targets.

1.2 Benefits

The benefit of this procedure is that the sales team will have a reference point to guide them in their sales and for the sales manager to identify areas of improvement within sales and between the different impacting areas such as: procurement, finance, operations and other.

1.3 Areas of Responsibility

The Managing Executive of Smart Solutions Sales is accountable for the performance of the sales team and to ensure that the Procurement and Finance process which facilitate the fulfilment of all sales order received.

All sales team members and/or business development managers must follow the sales processes and procedures to provide a strong pipeline and updating of the Customer Relationship Management (CRM) tool being used as best practice for effective sales management, and to ensure that all the information required by Finance and Procurement is provided to help provide a simple and strong sales experience for all customers.

1.4 Relationship between this Procedure and other Procedures/Processes

This procedure has an impact and associative relationship with procurement, finance, operations, and the different product houses.

2 Sales Management Procedure

2.1.1 Procedure Objectives and Metrics

2.1.1.1 The procedure objectives are defined as:

- Identifying new customers and engaging them
- Building a sales pipeline to meet targets and grow the business
- Onboard new customers

- Retain and cross-sell, and up-sell to existing customers
- Provide customer quotations and full orders through procurement

2.1.1.2 Procedure Metrics

Each objective of this procedure is measured according to the:

- sales targets set by the sales manager,
- the likelihood of sales conversions,
- customer onboarding,
- cross selling and up-selling (retention of customer) and the targeted revenue,
- the discount permissible,
- the lead-time to delivery of stock to customers and

2.2 Procedure Owner(s) and Responsible Parties

2.2.1 Procedure Owner

The sales manager is responsible for ensuring that procedures are adhered to the metrics are set as well as met.

2.2.2 Key Stakeholders

The key stakeholders are the sales team, the sales manager, the procurement and finance teams, respective product managers, marketing, and operations teams.

3 Typical Procedure Inputs

The typical procedure inputs are:

3.1 Information or Documents Needed

The following information or documents are necessary for effective measuring and enabling of the sales procedure:

- The sales pipeline measuring tool / CRM Tool
- Customer research and identification
- Customer contact information
- Sales targets
- Inventory stock level report.

3.2 Resources Needed

The following resources are needed to support this procedure:

- Sales and/or marketing brochures
- Application forms

- Non-Disclosure Agreements
- Terms and Conditions per Product Suite
- POPIA
- Sales targets
- Inventory stock level report
- Quotation Tool and master price list

3.3 Personnel Needed

The sales team with access to the procurement team to ensure that the correct stock ordered is delivered timeously to customers.

3.4 Preceding Processes/Procedures

Customer research and identification, pricing, procurement ordering and commissioning per target achieved are preceding processes/procedures.

4 Typical Procedure Outputs

The following outputs:

4.1 Typical outputs are:

- The sales pipeline report / CRM Tool reports
- Quotations and invoices to customers
- Completed application forms and customers uploaded onto the financial system
- Delivered orders to customers
- Payments received from customers

4.2 Technical or System

The primary sales system or tool is the Quotation tool

4.3 Documents

- CRM Reports/ Sales Reports
- Monthly targets

4.4 Enablement or Operationalisation of Another Process

The sales team drives the procurement team to order stock and provide deliveries to customers, in turn driving organisational revenue.

5 The Sales Procedure

The sales procedure is divided into 3 (three) primary stages: The New Customer Engagement Stage, The Customer Onboarding Stage and the Customer Order Fulfilment Stage. These stages must be followed sequentially for a new customer, but for existing customers the first two stages will be skipped.

5.1 New Customer Engagement

5.1.1 The salesperson will conduct market research to identify potential customers, or engage within their network, or a potential customer may contact Macrocomm to enquire about a specific product solution.

- *The CRM Tool is to be updated to provide a view of the sales conversion likelihood.*

5.1.2 The salesperson will meet with the customer to conduct a needs analysis and/or to provide an initial solution to meet the customer need.

- *The CRM Tool is to be updated to provide a view of the sales status*

5.1.3 The salesperson will provide a more detailed solution proposal with commercials for the customer's consideration.

- *The CRM Tool is to be updated to provide a view of the sales status*

5.1.4 The salesperson will build a relationship with the customer during the sales process from discovery to close the deal. When the customer accepts the solution and pricing, then the salesperson must drive the onboarding process to execute the order.

- *The CRM Tool is to be updated to provide a view of the sales status*

5.2 The Customer Onboarding Stage

5.2.1 The salesperson should provide the customer with an application form, provide a quotation for the order and obtain from the customer a purchase order.

- *The CRM Tool is to be updated to provide a view of the sales status*
- *The quantity of stock available to be checked, if to be ordered from supplier the Salesperson to provide lead time for delivery to customer based upon availability; if no stock a 14 (fourteen) day lead time.*

5.2.2 The salesperson to work with the finance team to confirm the success of the customer vetting for either a contract based deal or a cash-only deal.

- *The CRM Tool is to be updated to provide a view of the sales status*

5.3 The Customer Order Fulfilment Stage

5.3.1 Once the customer has been successfully vetted, the salesperson must confirm that all the required documentation is received from the customer.

5.3.2 The Procurement Checklist to be completed and attached to the Purchase Order, and given to the Procurement Manager.

5.3.3 The Procurement Manager will confirm stock, and if there is insufficient he will place an order. The salesperson must keep the customer informed of when the stock will be delivered.

- *If procurement is ordering from supplier(s) then salesperson to notify client of a 14 (fourteen) day lead time; only if there is no stock on hand.*

5.3.4 Once the stock is available, Procurement will provide a copy of the Purchase Order to the Finance Team to issue the customer with an invoice for payment. When payment has been received and confirmed by Finance, then Procurement will ship the order to the customer.

- *The CRM Tool is to be updated to provide a view of the sales status*

6 Risks and Opportunities

6.1 Risks

The following risks have been identified:

RISK	BUSINESS IMPACT	MITIGATION ACTIONS
Non-Adherence to Procedure	Loss of potential sale	Ensure all sales team members are trained on the process and understand the sales tools
	Customer complaint in order delays	Ensure all sales team members are trained on the process and work closely with procurement, and understand their inventory and supplier order processes to manage customer sales regarding lead times
	Inaccuracy in pipeline reporting that result in over- or underreporting on sales pipeline impacting forecasting and projections for the year	Ensure all sales team members are trained on the process and how to be diligent with their pipeline management and reporting.

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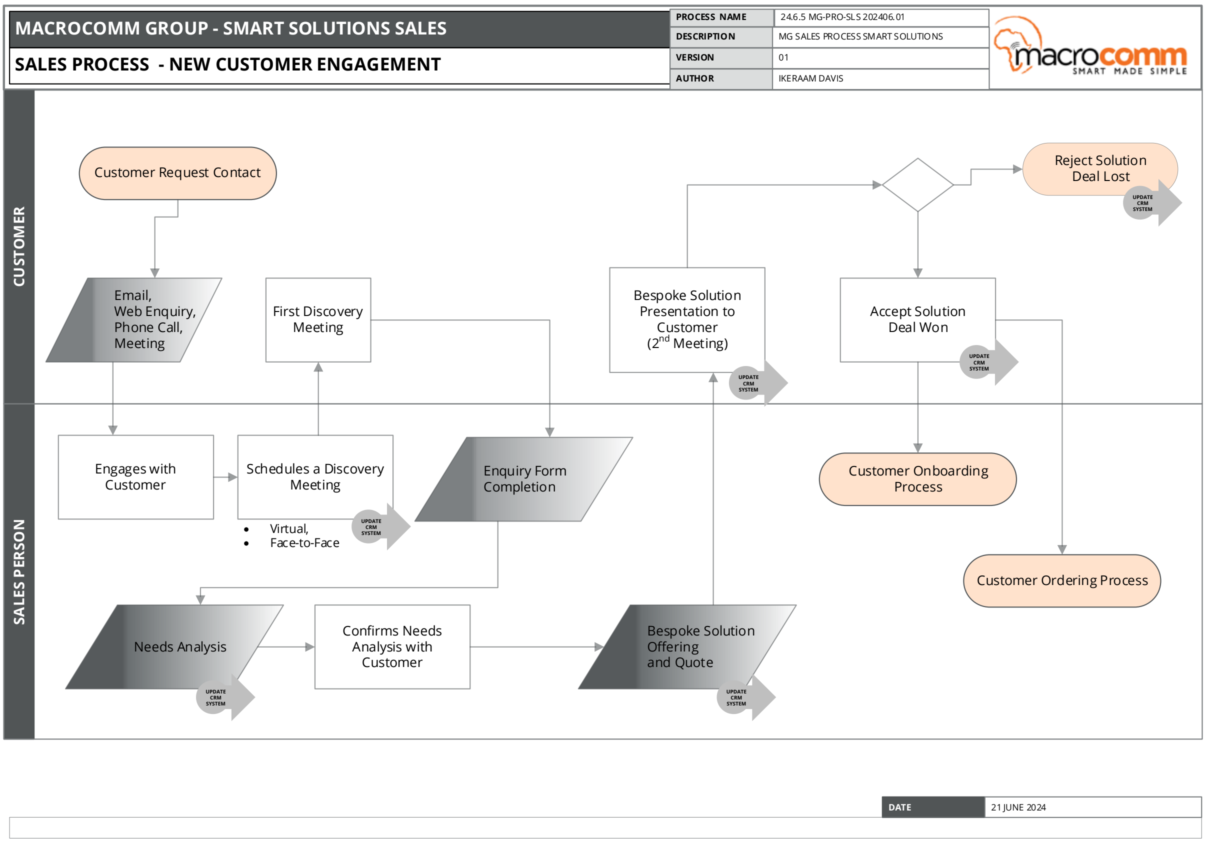
6.2 Opportunities

The following opportunities table will used to help improve the procedure and processes to for greater sales efficacies.

OPPORTUNITY	BUSINESS IMPACT	PROCESS/PROCEDURE AMENDMENT, TRAINING REQUIREMENT

7 Processes

The processes mapped below support this procedure.



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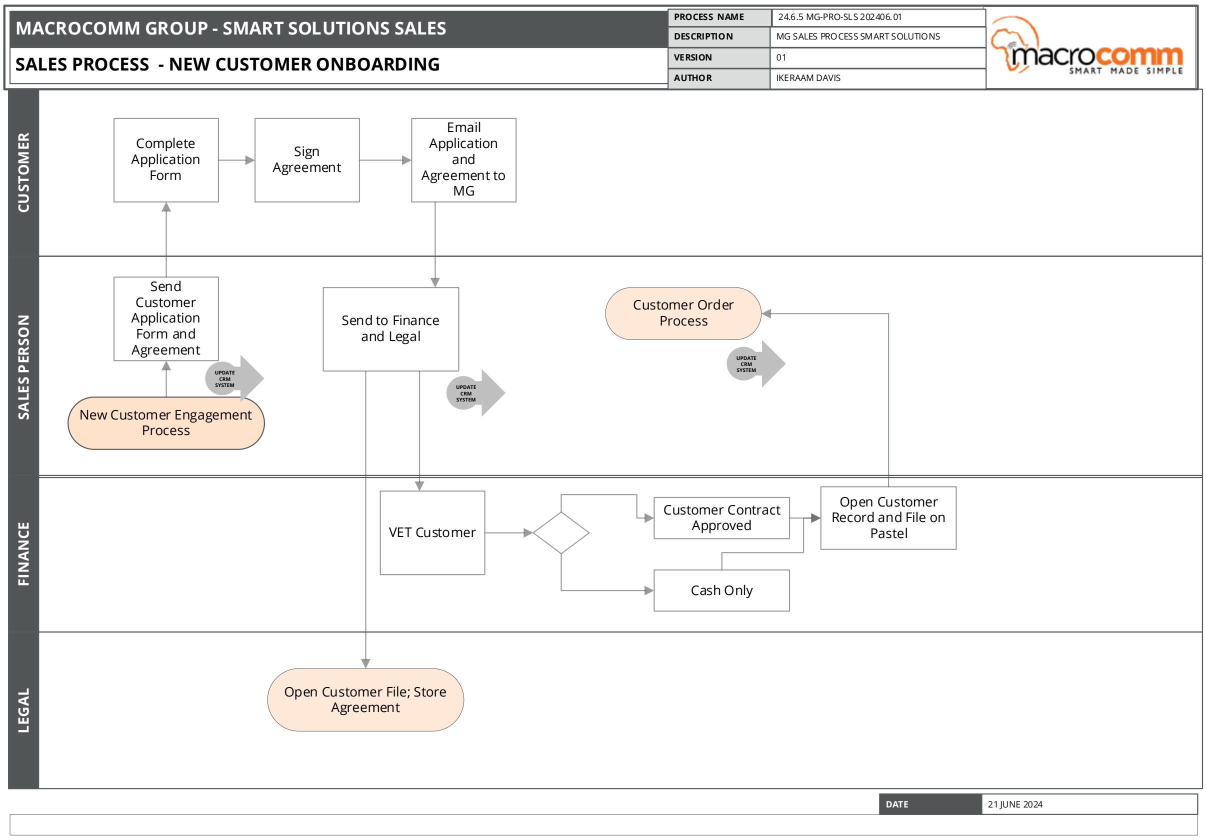

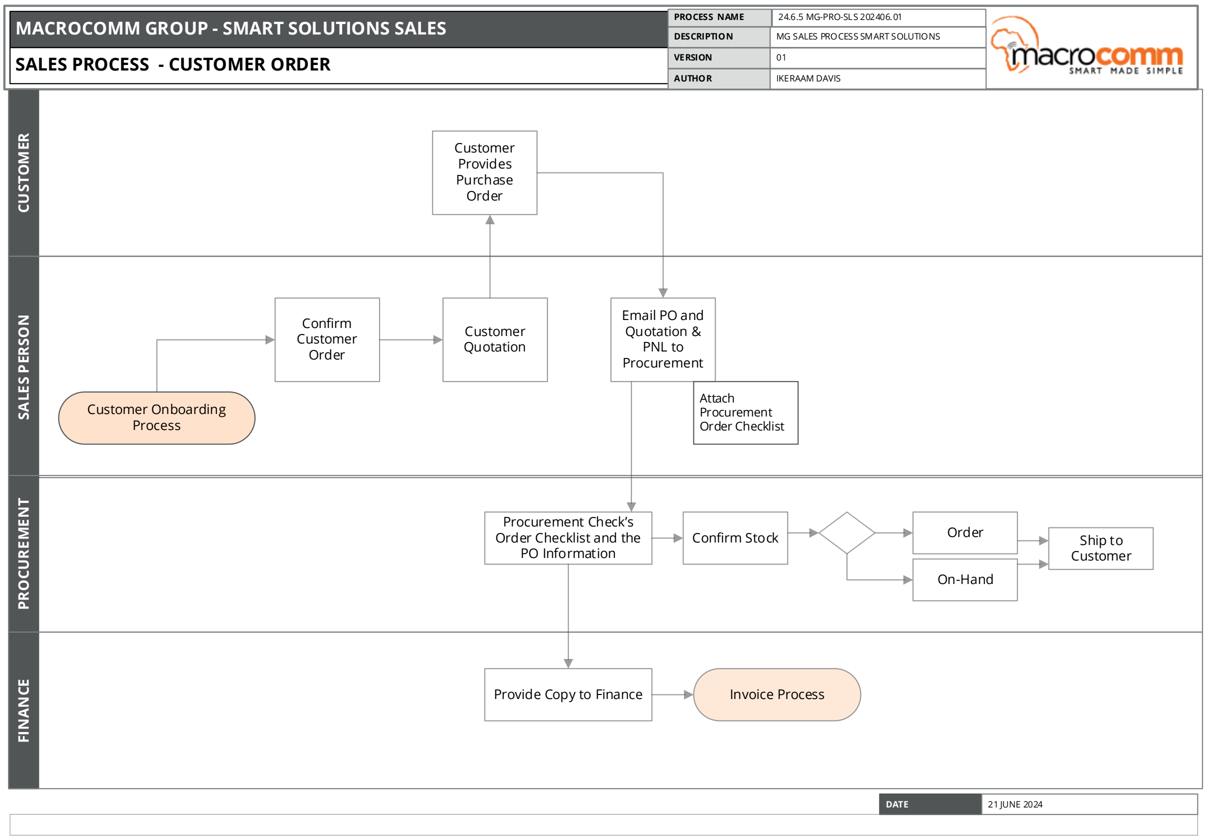

8 Support

If there are any queries or problems regarding the sales procedure, the Managing Executive of Smart Solutions Sales can be contacted on smartsales@macrocomm.co.za