**SALES AND MARKETING – (SOP) STANDARD OPERATING PROCETURES**

**Subject: DAILY Briefing:**

**Standard:**

A daily morning brief must be conducted with the entire Sales Team at a fixed stipulated time

Rationale:

The Daily Line-up allows members of the team to share progress information, and offers a platform for the Director Of Market to motivate production, address challenges and encourage open communication between team members.

**Procedure:**

1. The Daily Line-up is to be conducted by the Director of Market or a designated affiliate in absentia, and must encompass the following:
   1. Daily Dashboard & Pick-up Review
   2. Individual Daily Activity
   3. SA's Entertainment Schedule
   4. News & Update

***End of S.O.P. – daily briefing***

**SALES REPORT**

**Standard:**

A Weekly & Quarterly Sales Report must be completed by the individual SA to detail completed & forthcoming sales activities.

**Rationale:**

Sales Reports enable the DOM (Director Of Market) to measure the productivity of the individual SA. Constant updates also provide a platform for the team to have a consolidated understanding of the industry and market in general.

**Procedure:**

**1. Weekly Sales Report**

The weekly report will be submitted on Monday each week, and must encompass the following:

1. Key Business Activities
2. Key Business Confirmed
3. Key Business Lost (with reasons if any)
4. New Sales Leads
5. Upcoming Week Action Plan

**2. Quarterly Sales Report**

The quarterly report will be submitted by the 7th of the following month, and must encompass the following:

1. Market Overview & Intelligence
2. Key Business Activities
3. Trade Shows / Road Shows / Events happen in the region
4. New Business Generated
5. Lost Business
6. Pending Sales Leads
7. Upcoming Quarter Activities
8. Upcoming Quarter Action Plan

***End of S.O.P. - SALES REPORT***

**TELEPHONE ETIQUETTE**

**Standard:**

To ensure a consistently high level of corporate etiquette when handling enquiries received through the telephone.

**Rationale:**

It is often through the telephone that potential clients first make contact with our sales team. Professionally managed telephone conversations with a systematic flow of information acquisition would effectively reinforce the positive image of the organization.

**Procedure:**

* 1. Telephone calls must be answered within four (4) rings
  2. When speaking over the telephone:

Be attentive and focus attention on the call

Do not attempt to multi-task Smile

Have pen and paper in hand to take notes

1. Standardized Greeting

Good morning / afternoon / evening. eOcambo Technology. This is <*Staff* *Name*>.How may I help you?

1. Gather Information

Caller's Name

How may I address you, sir / madam?

Caller's Company

May I know which company you are calling from?

Caller's Contact Detail May I have your contact number and email address please?

“Our solutions/system” Requirement How many system/solutions would you require?

Budget

Is there a budget you would like us to work within for you?

1. Closing the Call

Confirm all details

Proposal

Mr/Ms <Caller Name>, based on the information we have gathered from you, we shall be tailoring a proposal for your consideration. Once the proposal has been sent to you, I shall follow up with a call to you to finalize on the details as proposed.

Farewell

Thank you for your call, and once again, my name is <Staff Name> and I may be reached at <Phone number> or at <email address> should you require anything further. Have a great day ahead!

1. Follow-up

Good morning / afternoon / evening, Mr / Ms <*Client Name*>. This is <*Staff Name*> calling from eOcambo Technology. I am following up on the proposal we had sent on < *Date Proposal was Sent*>

Thank you for your time. We shall make the necessary revisions as discussed, following which we shall be sending you a finalized contract for your signature. We look forward to your final decision and cooperate with your company. Have a great day ahead!

**When the phone rings:**

* stop other activities smile
* answer the phone within 4 rings use standardized greeting
* have pen and paper ready to take notes

**During the call:**

* ascertain caller's name, company/department
* listen attentively to caller's requirements gather details as necessary
* confirm all details by repeating back to caller
* when transferring calls, inform caller of the other party's name & phone number

**When ending the call:**

* use standardized ending
* wait for caller to hang up first

***End of S.O.P. — TELEPHONE ETIQUETTE***

**FIELD SALES AND MARKETING STANDARD PROCEDURE**

**SA must:**

1. have a clear understanding of the Sales Management Cycle
2. achieve 1 quality Sales Calls daily or a minimum of 40 Sales Calls monthly (excludes tele-sales)

**Rationale:**

A structured sales cycle with clear deliverables ensures that the SM covers all areas when managing their clients.

**Procedure:**

**Sales Management Cycle**

1. Pre Sales Call
   1. Prospecting
      1. Identification of potential customers
   2. Approach
      * 1. Making the appointment
   3. Preparation
      * 1. Research background of company/individual
        2. Understand competitors & market conditions
           + Competitive Set
           + Monthly Sales Report
        3. Ensure presentation kit is up-to-date
        4. Ensure support materials are sufficient
           + Laptop / Presenter
           + Name Cards
           + Promotional Materials

Property Fact Sheet

Promotional Brochures

Sales Kit with Press Release

1. **Sales Call**
2. Be professionally groomed according to corporate standards & arrive at least 10 minutes before the appointment
3. Check with the client & be mindful of the allocated time for the duration of the appointment
4. Establish relationship by listening to the customer's needs & desires
5. Be sure to take notes
6. Product presentation to customer, keeping in mind their specific needs
7. Identify & overcome objections/resistance
8. Recap information/requirement from your notes with the client
9. Conclude meeting with a specific reversion timeframe
10. **Post Sales Call**
    1. Send cursory note of thanks to the client
    2. Send proposal by date as specified or within 48 hours of meeting
    3. Follow-up call to client within 72 hours after sending the proposal
    4. Prepare contract if necessary
11. **Documentation & Communication**
    1. At the end of each contact, points of matters discussed /or agreed must be clearly documented for future reference
    2. Pertinent points of the documentation must be included in the weekly report and stored on a designated drive on the property server
    3. All communication pertaining to rates /or commitments outside of the guidelines approved by the DOM must be copied via email to the DOM

**Flow Chart:**

**Pre Sales Call:**

* Identify potential customer Make appointment
* Research on company
* Be equipped with presentation & promotional material

**During Sales Call:**

* Be early by at least 10 minutes
* Establish allocated time for presentation
* Establish personal relationship with customer Conduct product presentation
* Take notes

**After Sales Call:**

* Send thank you note to client Send proposal
* Follow-up with client
* Prepare contract if necessary

**TRADE SHOW & ROAD SHOW**

**Standard:**

To effectively qualify and propose participation in industry-related trade shows & road shows to effectively marketing our company.

**Rationale:**

Trade & Road shows are excellent occasions to gain new business leads, and also to gather market intelligence. It is important to note that 80% of the annual show calendar is based on Corporate guidance, while the company may suggest participation in shows it deems justifiable for lead generation.

**Procedure:**

1. **Trade Show & Road Show**

**a. For Trade Show, DOM to propose participation indicating:**

* + 1. Potential Geographic Business Opportunities
    2. Updated Geographic Market Report
    3. Potential Awareness Generation
    4. Update Market Report

1. Upon approval, the DOM is to include this during the budgetary process
2. The DOM is to ensure of sufficient, updated & relevant marketing materials for the

duration of the show at least one (01) month prior to the show

e. Upon return, the DOM is to follow-up with a cursory email to potential clients with

48 hours indicating:

* 1. Points discussed on-site
  2. Summary of future activities & points of collaboration

f. DOM to submit a report of the trade show within one (01) week of return CEO to submit all expenditure claims within one (01) week of return

**OVERSEAS TRIP**

**Standard:**

Adherence to standard procedures in the planning of overseas trips

**Rationale:**

It is necessary for the Sales Team to conduct overseas travel in order to meet their foreign clients in person. A structured set of procedures will aid in a smoother planning process.

**Procedure:**

1. **Pre-Travel**
   1. **SA to submit trip action plan to the DOM 30 days prior to the trip indicating:**
      * 1. Objective of trip
        2. Target account visits
        3. Proposed itinerary
        4. Anticipated expenses
   2. **SA to submit the Travel Authorization Form at least 21 days prior to the following for signature:**
      * 1. CEO
2. **Duration of Trip**
   1. SA to ensure at least five (05) sales calls daily, and these should include:
   2. SA is to ensure that appointments are conducted with key decision makers
   3. SA are to ensure that the most updated materials and information are highlighted and handed out during the meeting
   4. SA are to document all meetings with a daily activity report
3. **Post-Travel**
   * 1. SA to ensure follow-up with clients within 48 hours of return to the office
     2. SA to submit the Expense Claim Form with supporting receipts
     3. SA to prepare a trip & expenditure report within seven (07) days of return with the following:
        1. Dates & Objective of trip
        2. Clients visited and follow-up action
        3. Report of production concluded if any (leads / tentative / definite)
        4. Proposals / Contracts sent