



# Sales Basics

## Quick Reference Card

### Understand Sales Process

**Sales** is a journey that requires a map known as the sales process.

Each stage of your sales journey requires different skills and strategies including:



**SCOUTING FOR LEADS:** Find potential customers through social media and networking.



**LEADS QUALIFICATION:** Confirm leads' need and buying capacity.



**APPROACH:** Customize introductions to prospects.



**PRESENTATION:** Show product benefits with real examples.



**HANDLING OBJECTIONS:** Show product benefits with real examples.



**CLOSING:** Finalize sales with possible negotiations.



**FOLLOW-UP:** Stay in touch post-sale for referrals and relationship-building.

### Essential Sales Skills

In today's market, **sales professionals** must possess diverse skills to turn leads into loyal customers.

Here are few key selling skills that every professional should have:

1. Communicating with customers.
2. Master the skill of persuasion.
3. Use your negotiation skills.
4. Build trust with prospects and clients.
5. Understand and advise customers.



### Types of Sales Roles

Sales is a broad field with different roles. Here's a simple list:

- **Inside Sales:** Sells over phone or email.
- **Outside Sales Representative:** Travels to sell.
- **Sales Development Representative:** Finds potential customers.
- **Account Executive:** Cares for specific customers.
- **Sales Engineer:** Selling complex scientific or technological products.
- **Sales Manager:** Guides a sales team.

### Prepare for Sales Success

Gearing up for sales success involves several key strategies, such as:

**Mastering Product Knowledge** is the cornerstone of successful selling. This can:

- Enhances confidence
- Aids in answering queries
- Aligns with customer needs
- Support your sales pitch

**Identifying Your Target Market:** A target market is a group defined by traits like age or income, poised to be loyal customers.

To identify your target, evaluate your product's features, analyze competitors, and select the best market segment.

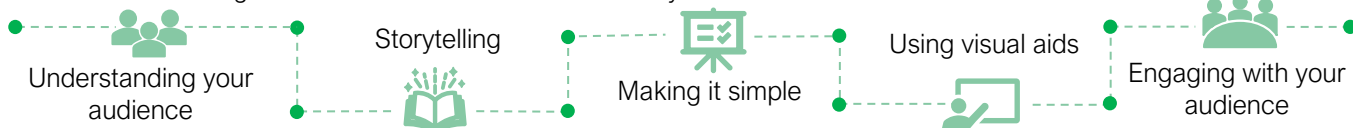
**Effective Sales Research Techniques** helps you understand customers, competitors, and your product. This can be done through:

- Customer Research
- Competitor Research
- Product Research

### Create Compelling Sales Presentation

#### How can you create a compelling sales presentation?

Creating a compelling sales presentation can effectively communicate the value of a product or service, influencing decisions and driving actionable results. You can do this by:



## Effective Closing Techniques

### Assumptive Close

Guide as if the customer has already chosen to buy.

### The Question Close

Ask a question to steer the customer towards a purchase.

### The Now-or-Never Close

Use time-bound offers to prompt fast decisions, keeping urgency authentic.



### The Silent Close

Give a moment of pause post-pitch for customer reflection.

### The Choice Close

Offer two options, both leading to a sale.

### The Summarize Close

Highlight your product's main benefits to affirm its value.

## Upsell and Cross Selling Strategies

**Upselling** encourages customers to buy a superior or upgraded version of a product. For example:

**“Consider upgrading to...”**



**Cross Selling** suggest complementary items to enhance their primary purchase. For example

**“You might also like to...”**



## Handle Rejection in Sales

**Handling rejections** is an integral part of sales, and learning how to handle it well can make all the difference. Here's how you can do it:

1. Keep your sales prospects full
2. Listen and learn from feedback
3. Review and adjust your sales strategy
4. Build emotional resilience
5. Celebrate success no matter how small

## Customer Follow-Up Techniques

Keeping in touch with customers after they've made a purchase can drive customer retention and boost sales.

Here are effective follow-up techniques:

- Choose the right time to reach out
- Treat customers uniquely
- Use various channels
- Be conversational
- Offer added value
- Follow-up again if needed.
- Make responding simple



## Sales Metrics and KPI

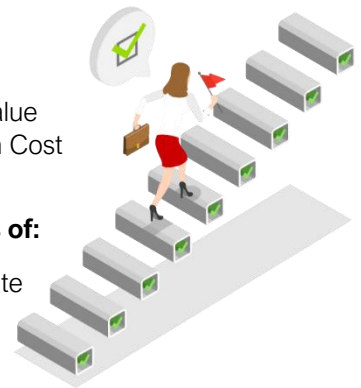
**Sales metrics** and **Key Performance Indicators (KPIs)** are essential tools in evaluating sales performance, guiding decision-making, and setting goals.

**Sales KPI consists of:**

- Sales Growth
- Sales Target
- Customer Lifetime Value
- Customer Acquisition Cost
- Churn Rate

**Sales Metrics consists of:**

- Lead Conversion Rate
- Average Deal Size
- Sales Cycle Length
- Win Rate
- Quota Attainment



## Customer Retention Strategies

**Customer retention** focuses on keeping existing customers as they're most effective than acquiring new ones.



### Did You Know?

It costs 6-7x More to gain a new customer than it does to keep your present customers.

### 5 Strategies to Improve Customer Retention

- Enhance Customer Service
- Introduce Loyalty Programs
- Encourage Feedback
- Maintain Regular Communication
- Offer Unexpected Perks

## Customizable Courses

Bite-sized Skills. Ready to Use. Uniquely Yours.

### Customizable Courses

3,000 bite-sized skills, ready for use or personalization. **SCORM-compatible**.

### AI Course Builder

Create stunning courses with **AI-enhanced content**. Similar to Articulate Rise—but better!

### Skill Assessments

Pinpoint existing knowledge, spot deficiencies and measure improvement.

### LMS

A friendly, versatile learning platform your users will love.



**Business Skills**  
28 courses



**Career Development**  
22 courses



**Compliance & Safety**  
28 courses



**Customer Service**  
6 courses



**Diversity & Inclusion**  
10 courses



**Google**  
14 courses



**HR**  
8 courses



**Leadership & Management**  
15 courses



**Microsoft**  
58 courses



**Onboarding**  
6 courses



**Sales & Marketing**  
14 courses



**Wellness**  
15 courses

## Learning Products for Trainers, By Trainers

Are You	CustomGuide
Tired of lengthy course creation?	Why create training when we've done it for you? Customize our courses and make them yours!
Struggling with user engagement?	Our courses are bite-sized, interactive, and <b>fun</b> . Clients report up to 400% more user engagement.
Wanting a simpler user experience?	CustomGuide is super-friendly; you and your learners are going to <b>love</b> it!

### 3 Ways to Create Stunning Courses

- AI-Generated Content:** Fast, efficient, and brilliantly tailored to your learners.
- Customize Our Courses:** Use our vast library of ready-to-go courses; personalize to fit your needs.
- Use Your Own Materials:** Add videos, PDFs, SCORM files, and slide decks.

Assign courses or export to SCORM.

### Create Course

Course Name

Employee Onboarding

#### Course Creation Method:

- AI-Assisted Content**  
Generate new course content using AI.
- Customize Existing Course**  
Tailor an existing course to your needs.
- Blank Course**  
Start from scratch with a blank canvas.

Create Course

## Trusted by 3,000 Organizations



"Customizing the courses has saved countless hours of work."

Yale

"Everyone is impressed with your features and ease of use. What a terrific product!"



4.8 out of 5 reviews