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The Definitive Guide for Sales Professionals

17 Key Knowledge Domains Every Salesperson Should Know
Key Terms Sales Professionals Use Everyday
Authoritative Literature References to Improve Your Knowledge
70+ Pages of Content You Can Use Right Away
How a Professional Certification Can Accelerate Your Career

Sales & Marketing Executives International Inc.

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Knowledge Domains and Key Terms for SMEI Certified Professional Salesperson Exam

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Domain 1: Selling & Salespeople

What You Need to Know

- What is selling?
- Why should you learn about selling even if you do not plan to be a salesperson?
- What is the role of personal selling in a firm?
- What are the different types of salespeople?
- What are the rewards of a selling career?

What is Personal Selling?

Human-driven interaction between and within individuals or organizations
- Helps bring about economic exchange within a value-creation context.

Steps are not sequential, and not all steps are required for all buying situations

Involves multiple people and organizations

Creates **value**
- **Customer value proposition** or **C V P**: Collection of buyer-specific benefits.

Creates economic exchange
- Involves profits for both parties.
- Personal value equation equals the difference between benefits received and the sum of the selling price and the time and effort to purchase.

Key Terms

- active listening
- analogy
- articulation
- body language
- decoding
- 80–20 listening rule
- emotional labeling
- encoding
- feedback
- inflection
- intimate zone
- loudness
- mirroring
- noises
- nonverbal communication
- personal zone
- persuading
- public zone
- response time
- social zone
- speaking–listening differential
- two-way communication
- voice characteristics
- word picture

Knowledge Domain Summary:

This domain involves the principles of communication and how they can be used to build trust in relationships, improve selling effectiveness, and reduce misunderstandings. The communication process consists of a sender, who encodes information and transmits messages, and a receiver, who decodes the messages. A communication breakdown can occur when the sender does a poor encoding job, when the receiver has difficulty decoding, and when noise and the environment interfere with the transmission of the message.

Effective communication requires a two-way flow of information. At different times in the interaction, both parties will act as sender and receiver. This two-way process enables salespeople to adapt their sales approach to the customer's needs and communication style.

When communicating verbally with customers, salespeople must be careful to use words and expressions their customers will understand. Effective communication is facilitated through the use of word pictures and by appropriate voice characteristics like inflection, articulation, and the proper rate of speech and loudness.

Listening is a valuable communication skill that enables salespeople to adapt to various situations. To listen effectively, salespeople need to actively think about what the customer is saying and how to draw out more information. Some suggestions for actively collecting information from customers are to repeat, restate, clarify, summarize the customer's comments, and demonstrate an interest in what the customer is saying.

About 50 percent of communication is nonverbal. Nonverbal messages sent by customers are conveyed by body language. The five channels of body language communication are body angle, face, arms, hands, and legs. No single channel can be used to determine the feelings or attitudes of customers. Salespeople need to analyze the body language pattern composed of all five channels to determine how a customer feels.

Salespeople can use nonverbal communication to convey information to customers. In addition to knowing how to use the five channels of body language, salespeople need to know the appropriate distances between themselves and their customers for different types of communications and relationships. Salespeople should learn to use their physical appearance and dress to create a favorable impression on customers.

Learning how to communicate effectively with technology is critical in today's marketplace. Not only should salespeople learn how to use the phone and e-mail effectively; they should also master the use of texting and social networking like Facebook and LinkedIn, as well as Twitter and blogs, to connect with their customers and prospects.

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Domain 2: Ethical and Legal Issues in Selling

What You Need to Know

- Why do salespeople need to develop their own codes of ethics?
- Which ethical responsibilities do salespeople have toward themselves, their firms, and their customers?
- Do ethics get in the way of being a successful salesperson?
- What guidelines should salespeople consider when confronting situations involving an ethical issue?
- Which laws apply to personal selling?

What is Ethics?

Principles governing the behavior of an individual or a group
- Establish appropriate behavior indicating what is right and wrong

Perspectives regarding ethics can vary from:
- Country to country
- Industry to industry

Unethical behavior hinders the relationship between buyers and sellers
- Ethical principles become increasingly important as firms move toward longer-term relationships

Basic principle: Customer remains free to make a choice
- **Manipulation**: Eliminating or reducing a buyer's choice unfairly

- Unethical in nature
- **Persuasion**: Influencing the buyer's decision, but the decision still remains the buyer's

Knowledge Domain Summary:

This domain involves the legal and ethical responsibilities of salespeople. These responsibilities are particularly important in personal selling because salespeople may face conflicts between their personal standards and the standards of their firms and customers. However, the evolution of selling has raised ethical standards and expectations; building long-term relationships with customers doesn't allow for unethical behavior.

Salespeople's ethical standards determine how they conduct relationships with their customers, employers, and competitors. Ethical issues in relations with customers involve the use of entertainment and gifts and the disclosure of confidential information. Ethical issues in relations with employers involve expenses and job changes. Finally, salespeople must be careful in how they talk about competitors and treat competitive products.

Many companies have ethical standards that describe the behavior expected of their salespeople. In evaluating potential employers, salespeople should consider these standards.

Salespeople also encounter many situations not covered by company statements and therefore must develop personal standards of right and wrong. Without personal standards, salespeople will lose their self-respect and the respect of their company and customers. Good ethics are good business. Over the long run, salespeople with a strong sense of ethics will be more successful than salespeople who compromise their own and society's ethics for short-term gain.

Statutory laws (such as the Uniform Commercial Code) and administrative laws (such as Federal Trade Commission rulings) guide the activities of salespeople in the United States. Selling in international markets is complex because of cultural differences in ethical judgments and laws that relate to sales activities in various countries.

Key Terms in This Domain:

- administrative law
- agent
- backdoor selling
- bribes
- business defamation
- CAN-SPAM Act
- collusion
- common law
- conspiracy
- contract to sell
- credulous person standard
- cultural relativism
- Do-Not-Call Registry
- deception

- ethical imperialism
- ethics
- expressed warranty
- False Claims Act
- FOB factory
- Foreign Corrupt Practices Act (FCPA)
- free on board (FOB) destination
- implied warranty
- invitation to negotiate
- kickbacks
- lubrication
- manipulation
- noncompete clause
- nondisclosure agreement (NDA)
- offer
- order
- persuasion
- poaching
- price discrimination
- privacy law
- reciprocity
- resale price maintenance
- sale
- sales puffery
- sexual harassment
- spiffs (push money)
- statutory law
- subordination
- trade secrets
- tying agreement
- Uniform Commercial Code (UCC)
- Warranty

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Domain 3: Buying Behavior and the Buying Process

What You Need to Know

- What are the different types of customers?
- How do organizations make purchase decisions?
- Which factors do organizations consider when they evaluate products and services?
- Who is involved in the buying decision?
- What should salespeople do in the different types of buying situations?
- Which changes are occurring in organizational buying, and how will these changes affect salespeople?

People buy to:

- Satisfy a want or desire
- Solve a problem
- Satisfy an impulse

Knowledge Domain Summary:

Salespeople sell to many different types of customers, including consumers, business enterprises, government agencies, and institutions. This domain focuses on selling to organizations rather than to consumers. Selling to organizations differs from selling to consumers because organizations are more concentrated, demand is derived, and the buying process is more complex.

The organizational buying process consists of eight steps, beginning with the recognition of a need and ending with the evaluation of the product's performance. Each step involves several decisions. As organizations progress through these steps, decisions made at previous steps affect subsequent steps, leading to a creeping commitment. Thus, salespeople need to be involved in the buying process as early as possible.

The length of the buying process and the role of various participants depend on the customer's past experiences. When customers have had considerable experience in buying a product, the decision becomes routine—a straight rebuy. Few people are involved, and the process is short. However, when customers have little experience in buying a product—a new task—many people are involved, and the process can be lengthy.

The people involved in the buying process are referred to as the buying center. The buying center is composed of people who are initiators, users, influencers, gatekeepers, and deciders. Salespeople need to understand the roles buying center members play to effectively influence their decisions.

Individuals in the buying center are concerned about satisfying the economic, quality, and service needs of their organization. In addition, these people have personal needs they want to satisfy.

Organizations face an increasingly dynamic and competitive environment. Purchasing is becoming a strategic weapon with the development of supply chain management and supplier relationship management strategies.

The Internet is playing a much more important role in business-to-business transactions than it plays in the widely publicized business-to-consumer e-businesses. Business-to-business applications of the Internet are designed to support salespeople's ability to build relationships with major customers.

Key Terms in This Domain:

- always a share
- annual spend
- automatic replenishment (AR)
- buying center
- capital equipment
- coach
- creeping commitment
- decider
- derived demand
- economic influencer
- efficient consumer response (ECR) system
- electronic data interchange (EDI)
- emotional needs
- end user
- gatekeeper
- influencer
- initiator
- just-in-time (JIT) inventory control
- life-cycle costing
- lost for good
- manufacturer
- modified rebuy
- MRO supplies
- new task
- original equipment manufacturer (OEM)
- profit margin
- quick-response (QR) system
- rational needs
- reseller
- service level agreement (SLA)
- services
- straight rebuy
- supplier relationship management (SRM)
- supply chain management (SCM)
- technical influencer
- turnover (TO)
- user
- value analysis
- vendor analysis
- vendor loyalty

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Domain 4: Using Communication Principles to Build Relationships

What You Need to Know

- What are the basic elements in the communication process?
- Why are listening and questioning skills important?
- How can salespeople develop listening skills to collect information about customers?
- How do people communicate without using words?
- What are some things to remember when communicating via technology like phones, e-mail, texting, and social media?
- How does a salesperson adjust for cultural differences?

Two-Way Communication Process

- Interpersonal communication in which both parties act as senders and receivers.
- **Encoding**: Translation of thoughts into words.
- **Decoding**: Interpreting the meaning of a received message.

Feedback: Information given to a salesperson indicating how he or she is performing. Knowledge

Domain Summary:

This domain involves the principles of communication and how they can be used to build trust in relationships, improve selling effectiveness, and reduce misunderstandings. The communication process consists of a sender, who encodes information and transmits messages, and a receiver, who decodes the messages. A communication breakdown can occur when the sender does a poor encoding job, when the receiver has difficulty decoding, and when noise and the environment interfere with the transmission of the message.

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- mirroring
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- persuading
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- response time
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- speaking–listening differential
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- voice characteristics
- word picture

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Domain 5: Adaptive Selling for Relationship Building

What You Need to Know

- What is adaptive selling?
- Why is it important for salespeople to practice adaptive selling?
- What kind of knowledge do salespeople need to practice adaptive selling?
- How can salespeople acquire this knowledge?
- How can salespeople adapt their sales strategies, presentations, and social styles to various situations?

Adaptive Selling

Changing sales behavior according to a selling situation
Illustrated by customized presentation
Emphasizes the importance of satisfying customer needs

Being adaptable:

- Increases buyer trust and commitment .
- Results in higher sales performance.

Knowledge Required for Adaptive Selling

Product and company knowledge

- Salespeople should have information about their products, services, company, and competitors' products.

Knowledge about sales situations and customers

- Categories of customer types or types of sales situations are developed by salespeople to:
  - Reduce the complexity of selling .
  - Free up the mental capacity to think more creatively.

Knowledge Domain Summary:

Adaptive selling uses one of the unique properties of personal selling as a marketing communication tool: the ability to tailor messages to individual customers and make on-the-spot adjustments. Extensive knowledge of customer and sales situation types is a key ingredient in effective adaptive selling.

To be effective at adapting, salespeople need considerable knowledge about the products they sell, the companies for which they work, and the customers to whom they sell. Experienced salespeople organize customer knowledge into categories. Each category has cues for classifying customers or sales situations and an effective sales presentation for customers in the category.

The social style matrix, developed by Merrill and Reid, illustrates the concept of developing categorical knowledge to facilitate adaptive selling. The matrix defines four customer categories based on a customer's responsiveness and assertiveness in sales interactions. To effectively interact with a customer, a salesperson needs to identify the customer's social style and adapt a style to match. The sales training program based on the social style matrix provides cues for identifying social style as well as presentations salespeople can use to make adjustments.

Key Terms in This Domain:

- adaptive selling
- amiable
- analytical
- assertiveness
- customized presentation
- diagnostic feedback
- driver
- expressive
- outlined presentation
- performance feedback
- responsiveness
- social style matrix
-
- standard memorized presentation
- style flexing
- versatility

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Domain 6: Prospecting

What You Need to Know

- Why is prospecting important for effective selling?
- Are all sales leads good prospects? What are the characteristics of a qualified prospect?
- How can prospects be identified? How can social media be used?
- How can the organization’s promotional program be used in prospecting?
- How can an effective lead qualification and management system aid a salesperson?
- How can a salesperson overcome a reluctance to prospect?

What is prospecting?

Process of locating potential customers for a product or service
Salespeople must find new customers to replace those who:

- Switch to competitors.
- Go bankrupt.
- Move out of the territory.
- Merge with noncustomers.
- Decide to do without a product or service.

Begins with locating a lead

- **Lead**: Potential prospect that may or may not have what it takes to be a true prospect.

Salespeople may consider every lead a prospect without taking the time to check if these people really provide an opportunity to make a sale

- Should qualify the lead to avoid this mistake.
    - **Qualify the lead:** Process of determining whether a lead is in fact a prospect.

Knowledge Domain Summary:

Locating prospective customers is the first step in the sales process. New prospects are needed to replace old customers lost for a variety of reasons and to replace contacts lost in existing customers because of plant relocations, turnover, mergers, downsizing, and other factors.

Not all sales leads qualify as good prospects. A qualified prospect has a need that can be satisfied by the salesperson's product, has the ability and authority to buy the product, can be approached by the salesperson, and is eligible to buy.

Many methods can be used to locate prospects. The best source is a satisfied customer. Salespeople can also use the endless-chain method, networking, social media, lists and directories, cold canvassing (including blitzes), spotters, and becoming known as experts via blogs, speeches, and so forth. Companies provide leads to salespeople through promotional activities such as the Internet, inquiries from advertising and direct mail, telemarketing, trade shows, merchandise markets, and webinars/seminars.

Effective prospecting requires a strong plan that hinges on developing a lead qualification and management system and overcoming reluctance to prospect.

Key Terms in This Domain:

- bird dog
- blitz
- buying community
- center-of-influence method
- cold call
- cold canvass method
- customer referral value (CRV)
- database
- data mining
- endless-chain method
- exclusive sales territories
- extranet
- house accounts
- insight selling
- lead
- lead management system
- lead qualification system
- merchandise market
- negative referral
- networking
- North American Industry Classification System (NAICS)
- prequalification
- promoter
- prospect
- prospecting

- qualifying the lead
- referral event
- referred lead
- sales funnel
- selling deeper
- spotter
- Standard Industrial Classification (SIC)
- systems integrator
- trade fair
- trade show
- webinar

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Domain 7: Planning the Sales Call

What You Need to Know

- Why should salespeople plan their sales calls?
- What pre-call information is needed about the individual prospect and the prospect's organization?
- How can this information be obtained?
- What is involved in setting call objectives?
- Should more than one objective be set for each call?
- How can appointments be made effectively and efficiently?

About planning the sales call

Essential for achieving sales
Proper planning helps the salesperson:

- Obtain commitment and gain the buyer's respect and confidence.
- Meet his or her call objectives efficiently and effectively.

Knowledge Domain Summary:

This domain emphases the importance of planning the sales call. Developing a clear plan saves time for both salespeople and customers. In addition, it helps salespeople increase their confidence and reduce their stress.

As part of the planning process, salespeople need to gather as much information about the prospect as possible before the first call. They need information about both the individual prospect and the prospect's organization. Sources of this information include lists and directories, secretaries and receptionists, noncompeting salespeople, and direct inquiries made by the prospect.

To be effective, a call objective should be specific, realistic, and measurable. In situations requiring several calls, the salesperson should develop a plan with call objectives for each future call. Also, many salespeople benefit from setting multiple levels of objectives—primary, minimum, and optimistic—for each call.

As a general rule, salespeople should make appointments before calling on customers. This approach enables the salesperson to talk to the right person at the customer's site.
A number of methods can be used to make appointments. Perhaps the most effective is the straightforward telephone approach.

Key Terms in This Domain:

- analysis paralysis
- barriers
- customer value proposition (CVP)
- focus of dissatisfaction
- focus of power
- focus of receptivity
- influential adversaries
- minimum call objective
- optimistic call objective
- primary call objective
- sales portals
- screens
- secondary call objectives
- seeding
- selling center
- videoconferencing
- virtual sales call
- Webcasting

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Domain 8: Making the Sales Call

What You Need to Know

- How should the salesperson make the initial approach to create a good impression and gain the prospect's attention?
- How can the salesperson develop rapport and increase source credibility?
- Why is discovering the prospect's needs important, and how can a salesperson get this information?
- How can the salesperson most effectively relate the product or service features to the prospect's needs?
- Why is it important for the salesperson to make adjustments during the call?
- How does the salesperson recognize that adjustments are needed?
- How can a salesperson effectively sell to groups?

Four A's of the selling process:

- Acknowledge.
- Acquire.
- Advise.
- Assure.

Knowledge Domain Summary:

Salespeople need to make every possible effort to create a good impression during a sales call. The first few minutes with the prospect are important, and care should be taken to make an effective entrance by giving a good first impression, expressing confidence while standing and shaking hands, and selecting an appropriate seat.

The salesperson can use any of several methods to gain the prospect's attention. Salespeople should adopt the opening that is most effective for the prospect's personality style. Also critical is the development of rapport with the prospect, which can often be enhanced by engaging in friendly conversation.

Before beginning any discussion of product information, the salesperson can establish the prospect's needs by using open and closed questions. The SPIN technique is very effective for discovering needs in a major sale. In subsequent calls the salesperson should reiterate the prospect's needs.

When moving into a discussion of the proposed solution or alternatives, the salesperson translates features into benefits for the buyer. The salesperson also makes any necessary adjustments in the presentation based on feedback provided by the buyer's nonverbal cues and by verbal probing.

A close, harmonious relationship will enhance the whole selling process. The salesperson can build credibility by adhering to stated appointment lengths, backing up statements with proof, offering a balanced presentation, and establishing his or her credentials.

When selling to groups, the salesperson must gather information about the needs and concerns of each individual who will attend. The seller should also uncover the ego involvement and issue involvement of each group member. It is important to develop objectives not only for the meeting but also for what the seller hopes to accomplish with each prospect present at the meeting.

Now that you know how to start the sale, discover needs, relate features to specific benefits for the buyer, and build credibility, it is time to look more closely at how to communicate your ideas more effectively. That's the topic of the next chapter.

Key Terms in This Domain:

- advantages
- balanced presentation
- benefit
- benefit opening
- closed questions
- compliment opening
- credibility
- credibility statement
- customer benefit proposition
- FAB
- feature
- feature dumping
- FEBA
- Four A's
- halo effect
- implication questions

- impression management
- introduction opening
- major sale
- need payoff questions
- office scanning
- open questions
- opening
- problem questions
- product opening
- question opening
- rapport
- referral opening
- selective perception
- situation questions
- small talk
- SPIN
- trial close

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Domain 9: Strengthening the Presentation

What You Need to Know

- How can salespeople use verbal tools to strengthen a presentation?
- Why do salespeople need to augment their oral communication through tools such as visual aids, samples, testimonials, and demonstrations?
- What methods are available to strengthen a presentation?
- How can salespeople use visual aids and technology most effectively?
- What are the ingredients of a good demonstration?
- Is there a way to quantify the salesperson's solution to a buyer's problem?
- How can salespeople reduce presentation jitters?

Characteristics of a strong presentation:

Keeps the buyer's attention
Improves the buyer's understanding

- **Multiple-sense appeals:** Appealing to more than one sense .
    - Increases understanding dramatically.

Helps the buyer remember what was said

Offers proof of the salesperson's assertions

Creates a sense of value

Knowledge Domain Summary:

Strengthening communication with the buyer is important. It helps focus the buyer's attention, improves the buyer's understanding, helps the buyer remember what was said, and can create a sense of value.

Many methods of strengthening communication are available. These include such items as word pictures, stories, humor, charts, models, samples, gifts, catalogs, brochures, photos, ads, maps, illustrations, testimonials, and test results. Media available include portfolios, video, computers, and visual projectors.

A backbone of many sales presentations is the product demonstration. It allows the buyer to get hands-on experience with the product, something most other communication methods do not offer. Handouts and written proposals can also strengthen presentations.

It is often important to quantify a solution so the buyer can evaluate its costs in relation to the benefits he or she can derive from the proposal. Some of the more common methods of quantifying a solution include simple cost–benefit analysis, comparative cost–benefit analysis, return on investment, payback period, net present value, and calculation of opportunity cost, turnover, and profit margins. Salespeople should be prepared to present a clear customer value proposition that offers real value to the customer.

All communication tools require skill and practice to be used effectively. Outstanding salespeople follow a number of guidelines to improve their use of visuals, demonstrate their products more effectively, and reduce their nervousness.

Key Terms in This Domain:

- automatic replenishment (AR)
- collateral
- comparative cost–benefit analysis
- customer value proposition (CVP)
- digital collateral management system
- document camera
- efficient consumer response (ECR) system
- electronic data interchange (EDI)
- electronic whiteboard
- executive briefing center
- executive summary
- handouts
- inventory turnover
- multiple-sense appeals
- net present value (NPV)
- opportunity cost
- payback period
- portfolio

- profit margin
- quantifying the solution
- quick-response (QR) system
- request for proposal (RFP)
- return on investment (ROI)
- sales asset management system
- simple cost–benefit analysis
- testimonial
- value analysis
- visual presenter

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Domain 10: Responding to Objections

What You Need to Know

- How should salespeople sell value and build relationships when responding to objections?
- When do buyers object?
- What objections can be expected?
- Which methods are effective when responding to objections?
- How do you deal with tough customers?

About objections:

Concerns or questions raised by the buyer

Goal: To sell real value to the buyer

Salespeople should show proper attitude toward buyers by:

- Answering sincerely.
- Refraining from arguing or contradicting.
- Welcoming objections.

Knowledge Domain Summary:

Responding to objections is a vital part of a salesperson's responsibility. Objections may be offered at any time during the relationship between buyer and salesperson. They are to be expected, even welcomed, and they must be handled with skill and empathy.

Successful salespeople carefully prepare effective responses to buyers' concerns. Salespeople need to develop a positive attitude, commit to always telling the truth, refrain from interrupting, anticipate and forestall known objections, and learn how to evaluate objections.

Buyers object for many reasons. They may have no money, or they may not need the product. They may need more information or misunderstand some information already offered. They may be accustomed to another product, may not think the value exceeds the cost, or may not like the product's features. They may want to get rid of the salesperson or may not trust the salesperson or his or her company. They may want time to think or may object for many other reasons.

Effective methods of responding to objections are available, and their success has been proved. Methods exist both for concerns that are not true and for objections that either are true or are only the buyer's opinion. Sensitivity in choosing the right method is vital. Salespeople need to develop skill in responding to price objections and in dealing with tough customers. Nothing will substitute for developing skill in these areas.

Key Terms in This Domain:

- acknowledge method
- boomerang method
- compensation method
- direct denial method
- excuses
- feel–felt–found method
- forestall
- friendly silent questioning stare (FSQS)
- indirect denial method
- LAARC method
- objection
- pass-up method
- pioneer selling
- postpone method
- probing method
- referral method
- revisit method
- superior benefit method
- third-party-testimony method
- turnover (TO)

Authoritative Literature:

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Domain 11: Obtaining Commitment

What You Need to Know

- How much emphasis should be placed on closing the sale?
- Why is obtaining commitment important?
- When is the best time to obtain commitment?
- Which methods of securing commitment are appropriate for developing partnerships?
- How should pricing be presented?
- What should a salesperson do when the prospect says yes? When the prospect says no?
- What causes difficulties in obtaining commitment, and how can these issues be overcome?

About securing commitment

Closing: Asking for the buyer’s business

Traditional emphasis on getting the sale no matter what:

- Damages trust.
- Insults the buyer’s intelligence.

Should be the natural, logical progression of any sales call.

Importance of securing commitment

- Tells the salesperson what to do next.
- Defines the status of the client.
- Failing to obtain commitment results in taking longer time to obtain a sale.
- Company's future success depends on goodwill and earning a profit.
- Results in financial rewards for the salesperson.

Knowledge Domain Summary:

Commitment cannot be obtained by some magical or miraculous technique if the salesperson has failed to prepare the prospect to make this decision throughout the presentation. Salespeople should always attempt to gain commitment in a way that is consistent with the objectives of the meeting. Obtaining commitment begins with the salesperson's contact with the prospect. It can succeed only when all facets of the selling process fall into their proper place. All sellers need to keep in mind this old saying: "People don't buy products or services; they buy solutions to their problems!"

The process of obtaining commitment is the logical progression of any sales call. Commitment is important for the customer, the seller's firm, and the seller. Commitment should result in a win–win situation for all parties concerned.

Pricing is an important element of any sale and is usually presented at the time of closing. Quantity discounts, payment terms, and shipping terms can affect the final price charged to the buyer as well as influence the decision.

There is no one "right" time to obtain commitment. Salespeople should watch their prospects closely and recognize when to obtain commitment. Successful salespeople carefully monitor customer comments, their buyers' nonverbal cues and actions, and their responses to probes. Comments can be in the form of questions, requirements, benefits, and responses to trial closes.

To successfully obtain commitment, the salesperson needs to maintain a positive attitude, allow the customer to set the pace, be assertive rather than aggressive, and sell the right item in the right amounts. Engaging in these practices will result in a strong long-term relationship between buyer and seller.

No one method of obtaining commitment works best for all buyers. The direct request method is the simplest to use; however, the prospect often needs help in evaluating the proposal. In those instances, other methods may be more appropriate, such as the alternative choice, the benefit summary, the balance sheet method, or the probing method. No method of obtaining commitment will work if a buyer does not trust the salesperson.

If commitment is obtained, the salesperson should immediately assure the buyer that the choice was judicious. The salesperson should show genuine appreciation as well as cultivate the relationship for future calls.

If commitment is not obtained, the salesperson should analyze the reasons. Difficulties in obtaining commitment can be directly traced to wrong attitudes, a poor presentation, and/or poor habits and skills. Even if no commitment is obtained, the salesperson should thank the prospect for his or her time.

Key Terms in This Domain:

- aggressive
- assertive
- balance sheet method
- benefit summary method
- buyer's remorse
- buying signals
- cash discount
- closing
- closing cues
- cumulative discount
- direct request method
- follow-up
- post-purchase dissonance
- probing method
- requirements
- submissive
- trial close
- trial order

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Domain 12: Formal Negotiating

What You Need to Know

- What is negotiation selling? How does it differ from non-negotiation selling?
- What items can be negotiated in selling?
- What type of planning needs to occur prior to a negotiation meeting? How should a seller set objectives?
- How can the negotiation session be effectively opened? What role does friendly conversation play?
- Which negotiation strategies and tactics do buyers use? How should negotiators respond?
- What are the salesperson's guidelines for offering and requesting concessions?

Nature of Negotiation:

Negotiation: Bargaining process through which buyers and sellers resolve areas of conflict and arrive at agreements

- Areas of conflict.
  - Minor issues such as who should attend future meetings.
  - Major issues such as cost per unit or exclusive purchase agreements.

Knowledge Domain Summary:

This domain is about how to engage in win–win negotiating. It also emphasizes how buyers may engage in win–lose negotiating.

Almost anything can be negotiated. The areas of negotiation will depend on the needs of both parties and the extent of disagreement on major issues.

A successful salesperson is not necessarily a good negotiator. Important negotiator traits include patience and endurance, willingness to take risks, a tolerance for ambiguity, the ability to deal with conflict, and the ability to engage in negotiation without worrying that every person present will not be on one's side.

As in regular sales calls, careful planning counts. This step involves choosing the location, setting objectives, and developing and managing the negotiating team. The salesperson does not act alone in these tasks, but instead draws on the full resources of the firm.

Preliminaries are important in sales negotiation sessions. Friendly conversation and small talk can help reduce tensions and establish rapport. Agendas help set boundaries and keep the negotiation on track. Win–lose strategies that buyers use include a good guy–bad guy routine, lowballing, emotional outbursts, budget limitation, browbeating, and other tactics. As much as possible, the salesperson should respond to any win–lose maneuvers calmly and with the intent of bringing the other side back to a win–win stance.

Concessions, by definition, will occur in every negotiation. Many guidelines have been established to help negotiators avoid obvious problems. For example, no concession should be given unless the buyer gives a concession of equal value. Also, any concessions given are not formalized until the written agreement is signed; thus, all concessions are subject to removal if appropriate.

Key Terms in This Domain:

- accommodating mode
- adaptive planning
- agenda
- ambush negotiating
- avoiding mode
- best alternative to a negotiated agreement (BATNA)
- brainstorming session
- browbeating
- budget bogey
- budget limitation tactic
- consequences of no agreement (CNA)
- collaborating mode
- competing mode
- compromising mode
- concession
- emotional outburst tactic
- face
- Force Majeure Clause
- good guy–bad guy routine
- lowballing
- minimum position
- negotiation
- negotiation jujitsu

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- nibbling
- opening position
- red herring
- sneak attack
- target position
- trial balloon
- win–lose negotiating
- win–win negotiating
- win–win not yet negotiating

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Domain 13: Building Partner Relationships

What You Need to Know

- What different types of relationships exist between buyers and sellers?
- When is each type of relationship appropriate?
- What are the characteristics of successful partnerships?
- What are the benefits and risks in partnering relationships?
- How do relationships develop over time?
- What are the responsibilities of salespeople in partnerships?

The value of customers:

Customers are the primary revenue source for companies

- Strong relationships with customers provide a competitive advantage.

Customer lifetime value, C L V: Combined total of all future sales
Successfully retaining customers is important to all companies

Relationship marketing:

Creating the type of relationship that best suits the customer's need

- May or may not require a partnership.

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Stronger relationships can be built by building loyalty

- Types of loyalty.
  - **Behavioral loyalty**: Purchase of the same product from the same vendor over time.
  - **Attitudinal loyalty**: Emotional attachment to a brand, company, or salesperson.

Knowledge Domain Summary:

Many businesses are moving toward partnering strategies. A key premise is that long-term relationships can enable sellers to capture much, if not all, of a customer's lifetime value. Loyal buyers buy more and are willing to work more closely with sellers in mutually beneficial ways. However, most transactions between buyers and sellers will not be strategic partnerships. Many exchanges will continue to be market transactions and functional relationships.

Functional relationships and strategic partnerships are characterized by a mutual concern of each party for the long-run welfare of the other party. Both types of long-term relationships are based on mutual trust. However, strategic partnerships involve the greatest commitment because the parties are willing to make significant investments in the relationship.

Mutual trust, open communication, common goals, a commitment to mutual gain, and organizational support are key ingredients in successful relationships. These five factors form the foundation for win–win relationships between customers and salespeople.

Customers trust salespeople who are dependable, capable, and concerned about the customers' welfare. To build trust, salespeople need to be consistent in meeting the commitments they make to customers. Salespeople also need to demonstrate their concern for the well-being of customers.

Key Terms in This Domain:

- attitudinal loyalty
- awareness
- behavioral loyalty
- boundary-spanning employees
- commitment
- competence
- customer lifetime value (CLV)
- customer onboarding
- customer orientation
- customer satisfaction
- dependability
- dissolution
- expansion
- exploration
- functional relationship
- honesty
- knowledge management technology
- lead user
- likability
- market exchange
- mutual investment
- relational partnership
- relationship marketing
- relationship-specific assets
- solo exchange
- strategic partnership

- supplier relationship management (SRM)
- trust
- win–win relationship

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Domain 14: Building Long-Term Partnerships

What You Need to Know

- How important is service after the sale?
- How should salespeople stay in contact with customers?
- Which sales strategies stimulate repeat sales and new business in current accounts?
- Which techniques are important to use when handling complaints?

Expansion as part of building long-term partnerships:

Salesperson focuses on identifying additional needs and providing solutions
Involves:

- Generating repeat orders.
  - **Upgrading**: Convincing the customer to use a higher-quality product or a newer product.
    - **Full-line selling:** Selling an entire line of associated products.
      - Making the buyer realize the synergy of owning all the products in a line.
    - **Cross-selling:** Selling additional products that are not directly associated with the initial products.
      - Less expensive than acquiring a new client.

Knowledge Domain Summary:

Developing partnerships has become increasingly important for salespeople and their firms. Salespeople can develop partnerships and generate goodwill by servicing accounts properly and by strategically building relationships. Both salespeople and buyers benefit from partnering.

Many specific activities are necessary to ensure customer satisfaction and to develop a partnering relationship. The salesperson must maintain the proper perspective, remember the customer between calls, build perceptions of trust, monitor order processing, ensure the proper initial use of the product or service, help service the product, provide expert guidance and suggestions, and provide any necessary special assistance.

The best opportunities to develop goodwill are usually provided by the proper handling of customer complaints. Sales representatives should encourage unhappy customers to tell their stories completely, fully, and without interruption. A sympathetic attitude to a real or an imaginary product or service failure cannot be overemphasized. After determining the facts, the salesperson should implement the solution promptly and monitor it to ensure that proper action is taken.

The appropriate solution will depend on many factors, such as the seriousness of the problem, the dollar amount involved, and the value of the account. A routine should be developed to handle all complaints fairly and equitably.

In the expansion phase of the relationship, key sales activities are generating repeat orders, upgrading, cross-selling, and full-line selling. The goal is to achieve a partnership, in which case the seller is often designated a preferred supplier.

At this level of relationship, it is important that both organizations commit to the relationship from top to bottom and open communication directly between appropriate personnel in both organizations. At this point, salespeople become change agents as they work in both organizations to seamlessly integrate the partnership.

Sometimes relationships break up. When partnerships dissolve, usually there are multiple reasons for the breakup. For example, when a salesperson leans too heavily on a few personal relationships and those people leave or when the salesperson fails to monitor competitive actions, then the buying organization may feel less commitment to the relationship. Other reasons for dissolution include failing to monitor changes in the industry and becoming complacent. Winning a customer back is still a possibility and should be pursued when appropriate.

Key Terms in This Domain:

- champion
- change agent
- complacency
- corporate culture
- cross-selling
- full-line selling
- Internet of Things (IoT)
- preferred supplier
- rate of change
- scope of change
- upgrading

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Domain 15: Managing Your Time and Territory

What You Need to Know

- Why is time so valuable for salespeople?
- What can be done to “create” more selling time?
- What should be considered when devising a territory strategy?
- How does territory strategy relate to account strategy and building partnerships?
- How should you analyze your daily activities and sales calls?
- How can you evaluate your own performance so you can improve?

Value of Time:

Efficient management of time is important for salespeople to succeed
Managing time and territory is often a question of how to allocate resources

- Difference between stellar and average performance is based on how well the resources are allocated.

Knowledge Domain Summary:

A sales territory can be viewed as a small business. Territory salespeople have the freedom to establish programs and strategies. They manage a number of resources, including physical resources such as sample inventory, displays, demonstration equipment, and perhaps a company vehicle. More important, they manage their time, their customers, and their skills.

Managing a territory involves setting performance, activity, and conversion goals. Salespeople use these goals to allocate time to various activities and to manage customers.

To manage customers well, salespeople must analyze their potential. Accounts can be classified using the ABC method or the sales call allocation grid. These analyses tell how much effort should be put into each account. Some organizations use CRM software to conduct these analyses on the entire customer database, which helps identify patterns within a territory. Salespeople can use these patterns to develop account sales strategies.

More calls (working harder) can be accomplished by moving nonselling activities, such as paperwork, to nonselling time. Also, selling time can be used more efficiently (working smarter). For example, routing and zoning techniques enable salespeople to spend more prime selling time in front of customers instead of behind the steering wheel of a car.

Effective planning of the salesperson's day requires setting aside time for important activities such as prospecting and still making the appropriate number of sales appointments. Using the full workweek and employing technology such as telephones, computers, and fax machines can help the salesperson stay ahead of the competition.

Finally, salespeople must manage their skills. Managing skills involves choosing how to make sales calls and improving the way one sells. Improvement requires that salespeople first understand what they do well and what needs improvement. Evaluating their performance can provide them with that insight.

Key Terms in This Domain:

- ABC analysis
- account opportunity
- account share
- activity goals
- benchmarking
- circular routing
- cloverleaf routing
- conversion goals
- conversion ratio
- customer share
- leapfrog routing
- performance goals
- pipeline analysis
- prime selling time
- routine call patterns
- routing
- sales call allocation grid
- share of wallet

- straight-line routing
- strength of position
- tickler file
- variable call patterns
- zoning

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Domain 16: Managing Within Your Company

What You Need to Know

- Which areas of the company work with salespeople to satisfy customer needs?
- How do salespeople coordinate the efforts of various functional areas of the company?
- How do salespeople work with sales managers and sales executives?
- How do company policies, such as compensation plans, influence salespeople?
- How do salespeople work within the company to resolve ethical issues?
- What is the organizational structure, and how does it influence salesperson activities?

Internal Partnerships

Partnering relationships between a salesperson and another member of the same company Importance

- Apart from representing a company or a product, the salesperson also represents the customer to the company.
- Ability to work with groups inside the company can directly affect the sales record.

Role of sales

- Selling a company, its products, and its services to customers.
- Selling customers' needs to the companies and providing them with solutions for those needs

To service customers well, salespeople rely on personnel in other areas of the firm to do their respective jobs properly

- How well the coworkers assist salespeople may be a function of the relationship the salesperson has already established with them.

Questioning skills such as SPIN need to be used to understand the personal and professional needs of personnel in other departments.

Knowledge Domain Summary:

Successful salespeople manage resources and build internal partnerships with people in order entry, credit, billing, and shipping, as well as sales and marketing. These partnerships allow salespeople to keep the promises they make to customers when someone else must carry out those promises.

Salespeople in learning organizations also have a responsibility to carry the voice of the customer to other areas of the organization. Successful learning organizations are more adept at adapting to changing customer needs and developing successful products when salespeople fulfill their role of speaking for the customer.

In the sales organization salespeople work with and for a sales executive and a field sales manager. The sales executive determines policy and maintains financial control over the sales organization. Salespeople participate in the development of forecasts that the sales executive uses in the planning process.

Another policy decision involves the method of compensation for the sales force. The four basic methods are straight salary, straight commission, bonus, and a combination plan. Straight commission plans provide strong financial incentives for salespeople but give the company little control over their activities. Salary plans give greater control to the company but offer less incentive for salespeople to work hard.

Sales executives are also responsible for creating a culture that supports ethical activities. Policies (such as open-door policies) can encourage salespeople to act ethically. Ethical review boards are also useful in reviewing ethics policies, investigating potential ethics violations, and counseling salespeople who have concerns about the ethics of possible actions. Sometimes, however, salespeople face unethical requests from their managers. If that occurs, salespeople can choose from several courses of actions, such as blowing the whistle or appealing to an ethics review board.

Partnerships must be built within the sales force too. Some examples include team selling with product specialists, inside and outside teams, and multilevel selling.

Key Terms in This Domain:

- activity quota
- bonus
- bottom-up forecasting
- cap
- combination plan
- commission
- commission base
- commission rate
- customer service rep (CSR)
- draw
- ethics review board
- field sales manager

- field salespeople
- field support rep
- geographic salesperson
- gross margin quota
- house accounts
- inbound
- incentive pay
- inside salespeople
- internal partnerships
- key accounts
- multilevel selling
- national account manager (NAM)
- open-door policy
- outbound
- profit quota
- quota
- revenue quota
- salary
- sales quota
- straight commission
- straight salary
- strategic account manager (SAM)
- team selling

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Domain 17: Managing Your Career

What You Need to Know

- Which entry-level jobs are available to new college graduates?
- Where do I find these jobs?
- How should I go about getting interviews, and what should I do when I have an interview?
- What selection procedures besides interviews might I go through?
- Which career paths are available in sales?
- How can I prepare myself for a promotion into management?

Opportunities in Selling

- Serving others.
- Finding creative solutions to problems.
- Getting to know lots of people.
- Money.

Knowledge Domain Summary:

A sales career offers many opportunities for growth and personal development, but that career has to start somewhere. That is the purpose of the job search: to find a good match between what you need and have to offer and what a company needs and has to offer.

To achieve a match that results in mutual satisfaction, you must first understand who you are—specifically what you need and what you have to offer. You can ask yourself a number of questions to stimulate your thinking about the type of person you are and what you will need from a sales position. In addition, as you review your experiences in school, work, and other activities, you can identify the skills and characteristics that you have to offer.

Finding industries and companies with the characteristics you desire will require you to apply your marketing research skills. The library contains many sources of information that will help you. Personal sources can also be useful in providing information as well as leads for interviews, as can the Internet.

Sources for job interviews include the campus placement office, personal contacts, and advertisements. Résumés are personal brochures that help sell a candidate. Writing effective cover letters will help you get interviews off campus, while the interview itself is similar to a sales call. Plan questions that demonstrate your knowledge of and interest in the company. Also, plan to ask for information that will help you make your decision. Follow up after the interview to demonstrate your desire and perseverance.

You are the person in the company to whom your career means the most. Therefore, you must actively manage your own career. Set career goals that are compatible with family and personal objectives. Keeping the reasons for these career goals in front of you will enable you to make better decisions.

Learn the job you have now. You may someday manage people who have this job; the better you know it, the better you will be at managing it. To become a manager, you must first be a manager. Learn the manager's job as well and volunteer for activities and projects that will let you demonstrate your management ability.

Stress can occur in any job. Situational stress is short term, whereas felt stress is longer term. For many people, the key to managing stress is to reduce the influence of stressors because the causes of stress often cannot be eliminated.

Sales offers a challenging and exciting career. The opportunities are so varied that almost anyone can probably fit into some sales position. Even if you choose a career in another field, take advantage of the knowledge domains for professional selling. You should find these job search and career management tips helpful in any field. Good luck!

Key Terms in This Domain:

- application form
- assessment center
- conventional résumé
- disguised interview
- felt stress
- functional résumé
- greeter
- group interview
- interview
- KSAs
- panel interview
- portfolio
- references
- role ambiguity
- role conflict
- role overload
- role stress
- situational stress
- stress interview
- tests

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Your Guide to Becoming an SMEI Certified Professional Salesperson™

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Who is SMEI

Sales & Marketing Executives International, Inc. (SMEI) is the worldwide professional association for sales and marketing, founded in 1935. SMEI is a New York registered non-profit organization governed by an international board of directors. SMEI offers membership, professional certification and educational programs designed to help sales and marketing professionals advance their careers.

Who governs the SMEI professional certification program?

SMEI professional certification programs are governed by an independent international board of directors made up of business and academic leaders.

Who should get professional sales certification?

- Are you a serious salesperson who wants to stand out professionally to your customers and employer?
- Do you want to excel in the pursuit to partner with your customers to bring them outstanding value?
- Are you passionate about learning and growing as a true professional?
- Would you like to earn above average income?

If you can answer yes to the questions above and you personally uphold the highest standards of ethical and legal behavior you are an ideal candidate for professional certification.

Who qualifies for certification?

Sales professionals with at least one year of sales experience.

Who recognizes SMEI certification?

SMEI professional certification programs are embraced by organizations around the world. SMEI's professional certification programs are the only designations recognized by leading global universities including UBC Sauder School of Business (Canada), Western Governors University (USA), HAN University (Netherlands) and TDTU (Vietnam).

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What is professional certification?

A certification program is designed to test the knowledge, skills, and abilities required to perform a particular job, and, upon successfully passing a certification exam, to represent a declaration of a particular individual's professional competence. In some professions, certification is a requirement for employment or practice.

What is the difference between a degree and a professional certification designation?

A degree is achieved following a course of study at a post-secondary academic institution. Professional certification is granted after meeting prerequisites, passing an exam and requires annual maintenance including continuing education.

While achieving a degree is a great celebration of a milestone accomplished, achieving a professional certification designation is a celebration of a milestone accomplished and a commitment to lifelong learning and professionalism.

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What do my peers say about professional certification?

I have been a proud member of the SMEI community since my accreditation in 2009 as an SCPS! It was a vigorous and challenging process and very well worth the effort. I enjoy the full benefits of being a Professional member which allows me access to free webinars in many cases and discounts to other education and networking opportunities in others. I have met many other successful sales and marketing professionals through SMEI and look forward to reaping the benefits for a long time to come. No regrets on advancing my sales career, thanks SMEI!

Staci Caille´, SCPS
Sr. Inside Sales Representative, RLC Dealer Sales
The Toro Company

I have been SCPS certified since 2005 and find it to be one of the most valuable selling tools I have. This certification program has taught me how to think and plan every customer visit more efficiently. I have always been process driven, and this program has helped me refine my sales planning process to be more successful and grow my territory year over year. The most significant benefit to me is my customers look at me now as more of a resource, not just another salesman. SMEI has helped me grow as a sales professional over the last 12+ years.

Chris Makowski, SCPS
North East Territory Sales Manager
Ventrac by Venture Products Inc.

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What are the prerequisites to getting certified?

Meet the work experience requirement, pass a certification exam and sign the SMEI code of ethics.

What is the exam passing grade to achieve certification?

The exam passing grade is 75%.

What are the fees?

Fees vary based on your location and/or membership status with SMEI. Membership is not a requirement to become certified or to maintain your certification.

When you apply, we will review your application and a representative will confirm the price with you before proceeding.

What are the steps to getting certified?

1. Complete application form and pay required fees
2. Complete an optional study program to prepare for the exam
3. Register for the exam
4. Successfully complete the exam
5. Sign a code of ethics

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When can I apply?

Applications can be submitted at anytime.

When do I receive the exam study materials?

You will receive an email with information on how to access your exam study materials within 2 business days following receipt of your application and payment.

When is the exam due?

Exam must be completed within one year of your certification application date.

When are exams held?

Exams are held monthly with the exception of August.

When do I get my exam results?

Exam results are posted in your online SMEI account within 2 business days.

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Where do I study?

All of the study material is supplied is online and can be accessed anywhere in the world with a computer or mobile device and an Internet connection.

Where are exams held?

The exam is computer based and online. The exam can be taken anywhere in the world with a desktop or laptop computer equipped with a webcam and a reliable Internet connection.

Why get certified?

Professionalism — Sales Certification indicates a high level of professionalism to employers, coworkers and customers, increasing your value in the marketplace

Leadership — Sales Certification signifies you are dedicated to continuous improvement of your knowledge and skills

Recognition — Only the top sales professionals seek sales certification, indicating that you are a leading sales professional. A professional certification designation validates your knowledge, experience and professionalism.

Knowledge — Sales Certification improves your understanding of the most current sales processes and trends.

Earning Power — Sales Certification reinforces the skills and professionalism you need to be an above average earner in the sales profession.

Career Advancement — Having a Sales Certification designation on your social profile, resume and business card can help you position yourself to advance your career to more profitable and senior positions in sales.

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How do I apply?

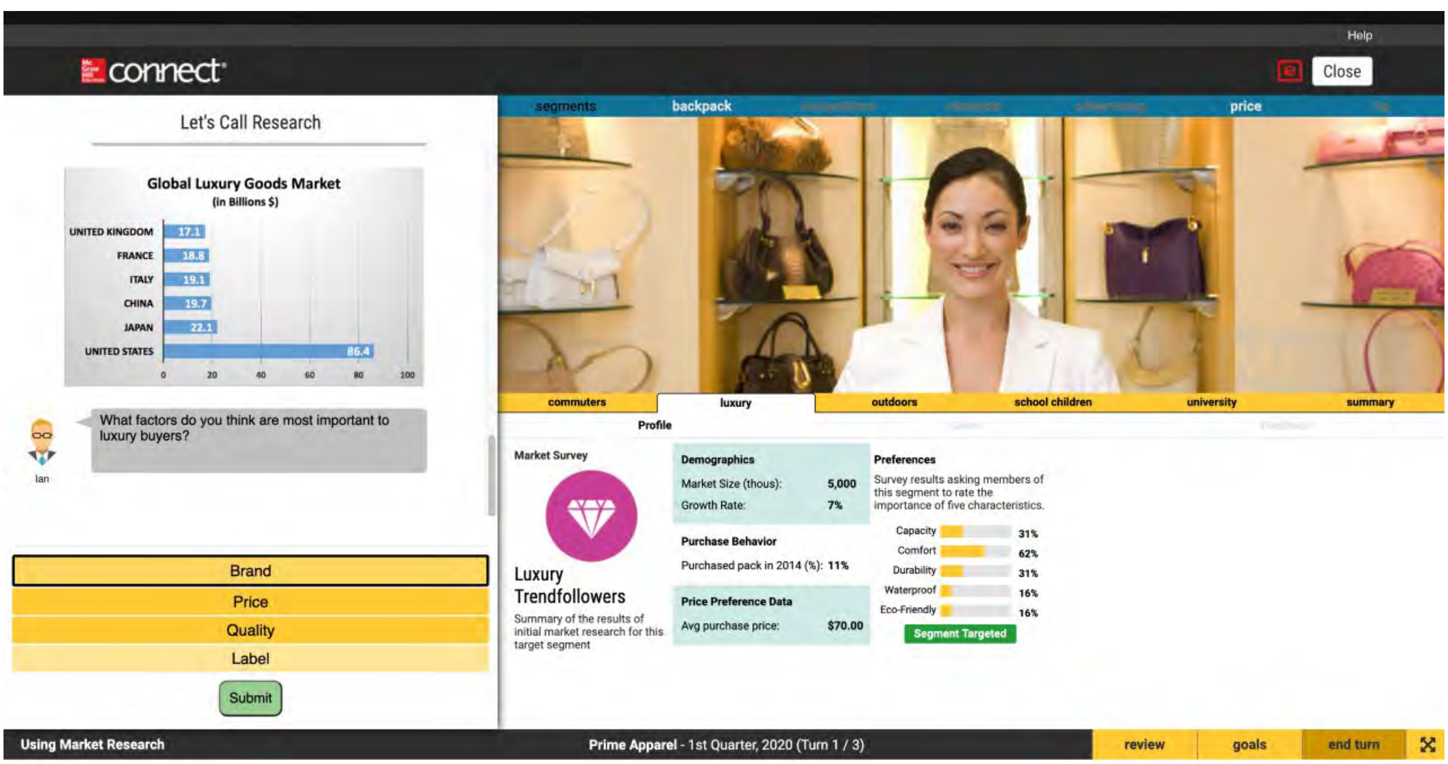
Complete an application form online on SMEI's website or for sales teams, or universities, apply through your company or institution.

How do I study?

You will receive a welcome email within 2 business days of your application.

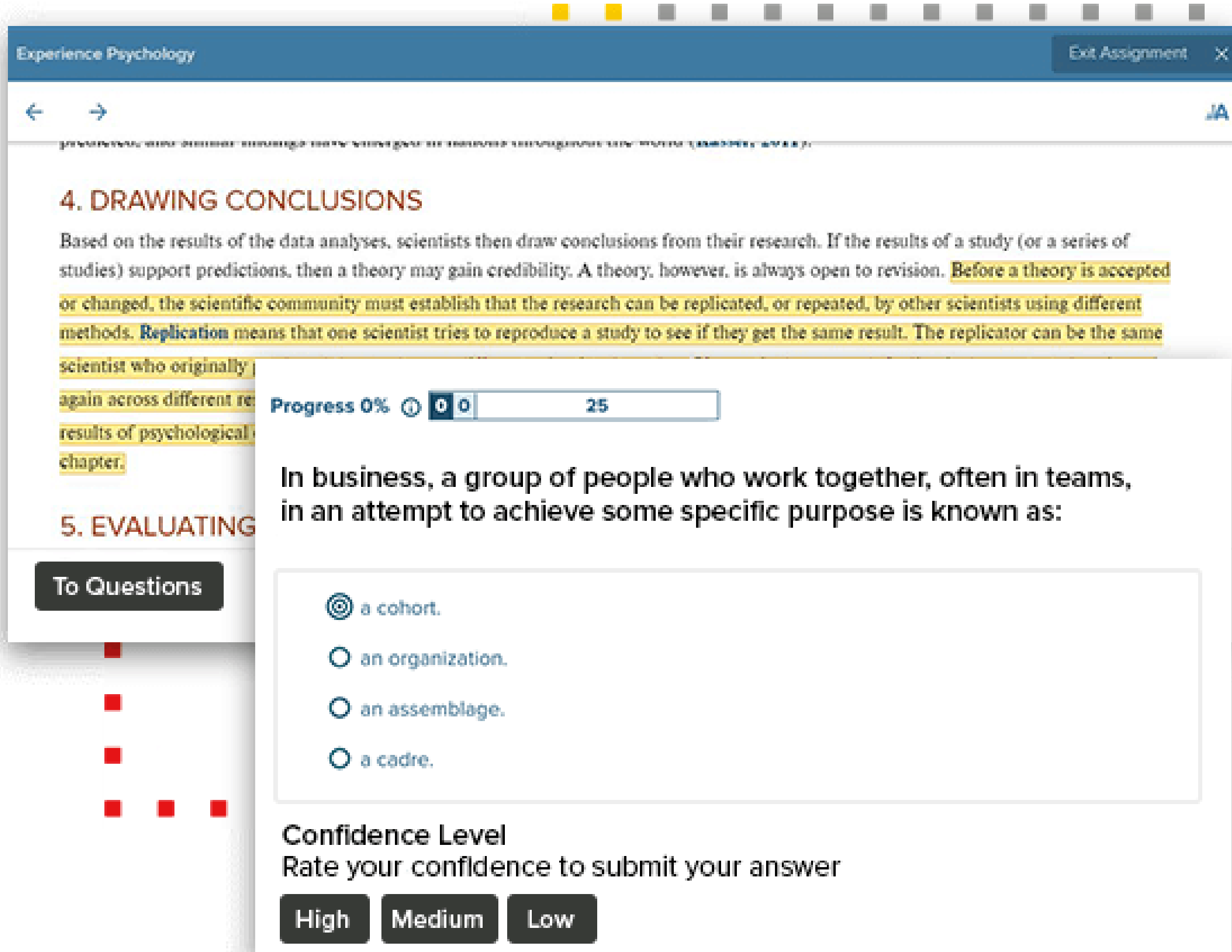
How do I use the ebook?

The eBook is a comprehensive study guide with a glossary of terms and detailed information comprising all aspects of professional selling. We recommend that you set up a personal study schedule and dedicate time each week to study a chapter and complete the accompanying exercises. Below is a sample knowledge check in the eBook.



How do I use the online learing tools?

The online learning tools include an interactive SmartBook that will guide you through the learning experience. Below is a sample of the reports you can use to get the most our of the program.



How long does the study take?

The study is self-paced and the amount of time it takes will depend on your personal study habits. We recommend that you set aside a few hours each week to study and plan for an overall study period of about 60 - 80 hours.

How do I take my exam?

The exam is online, and you will need a computer with Internet access and a webcam. Your exam will be proctored and can be taken at an SMEI approved test center or at your home or office providing you have a private space available

How many questions are on the exam?

The exam has a total of 180 questions including multiple choice and true false responses.

How do I get recognized for being certified?

When you achieve your certification, you can proudly use the SCPS™ (SMEI Certified Professional Salesperson) designation beside your name on your business cards and other stationery as well as on your email signature. SMEI will also issue you a digital badge which can be validated online. The digital badge includes a plug-in for LinkedIn so that you can enhance your online social profile.

You will also have the option to order a printed, gold embossed certificate that is suitable for framing.

YOUR GUIDE TO BECOMING AN SMEI CERTIFIED PROFESSIONAL SALESPERSON™ (SCPS™)

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