



Participant Handbook

Sector
Telecom

Sub-Sector
Handset

Occupation
Sales and Distribution - Handset Segment

Reference ID: **TEL/Q2100**, Version **5.0**
NSQF level **3**



Distributor Sales Representative

Website: www.tsscindia.com

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Shri Narendra Modi
Prime Minister of India

“ Skilling is building a better India.
If we have to move India towards
development then Skill Development
should be our mission. ”



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SKILLING CONTENT : PARTICIPANT HANDBOOK

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The preparation of this handbook would not have been possible without the Telecom Industry’s support. Industry feedback has been extremely encouraging from inception to conclusion and it is with their input that we have tried to bridge the skill gaps existing today in the industry.

This participant handbook is dedicated to the aspiring youth who desire to achieve special skills which will be a lifelong asset for their future endeavours.

About this book

Welcome to the “Distributor Sales Representative” training programme. This PHB intends to facilitate the participants with detailed knowledge about the concept of Telecom industry, Communication Electronics profession and their functioning. This Participant Handbook is designed based on the Qualification Pack (QP) under the National Skill Qualification framework (NSQF) and it comprises of the following National Occupational Standards (NOS)/ topics and additional topics.

1. TEL/N2112: Guide Retailers to Achieve Sales Targets
2. TEL/N2113: Conduct pre-planning for product distribution
3. DGT/VSQ/N0101: Employability Skills (30 Hours)

We trust this Participant Handbook will offer strong learning support and help budding professionals carve out engaging and rewarding careers in India's dynamic telecom industry.

Symbols Used



Key Learning
Outcomes



Steps



Tips



Notes



Practical



Unit
Objectives

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It is recommended that all trainings include the appropriate Employability skills Module. Content for the same is available here: <https://www.skillindiadigital.gov.in/content/list>





1. Introduction to the Sector and the job role of a Distributor Sales Representative



- Unit 1.1 - Introduction to the Program
- Unit 1.2 - Telecom Industry and Its Sub-sectors
- Unit 1.3 - Roles and Responsibilities of a Telecom Distributor Sales Representative
- Unit 1.4 - Distribution and Selling
- Unit 1.5 - Planning and Organizing the Work



Key Learning Outcomes



By the end of this module, the participants will be able to:

1. Explain the significance of the distribution sector in modern commerce and economic development.
2. Elucidate the key skills and competencies required for a Distributor Sales Representative.
3. Describe the challenges faced by Distributor Sales Representatives in managing sales and client relationships.
4. Determine the impact of effective distribution strategies on market reach and revenue growth.
5. Discuss the roles and responsibilities of a Distributor Sales Representative in ensuring seamless product delivery and customer satisfaction.

UNIT 1.1: Introduction to the Program

Unit Objectives

By the end of this unit, the participants will be able to:

1. Outline the course objectives and outcomes
2. List the necessary skills on which the participant will be trained

1.1.1 Overview of the Training Program

Sales Representatives with a clear understanding of the telecom industry and the essential skills required to perform effectively in their role. It will enable learners to gain knowledge of the telecom business environment, understand their key responsibilities, and develop both technical and behavioral competencies for professional success.

Through this program, learners will gain an overview of:

- The Telecom Industry and its ecosystem
- Roles and responsibilities of a Telecom Distributor Sales Representative
- Telecom store-specific key concepts and operations
- Behavioural, technical, professional, and linguistic skills required to perform the job effectively
- Planning and executing activities to achieve sales targets
- Strategies for efficient product distribution
- Methods to maintain, create, and update daily reports
- Customer handling techniques and best practices
- Gender and PwD sensitization for an inclusive workplace

Core Skills and Activities Covered

This training program focuses on building the following key skills:

- **Effective Communication:** Developing clear verbal and non-verbal communication for retailer and customer interactions.
- **Language Proficiency:** Using appropriate language for professional and customer-friendly communication.
- **Self-Upgradation:** Continuously improving personal and professional knowledge to stay updated.
- **Ability to Influence:** Building persuasion skills to enhance sales and strengthen customer relationships.
- **Time Management:** Planning and prioritizing tasks to improve productivity.
- **Customer Orientation:** Understanding customer needs and delivering solutions that improve satisfaction.

A Distributor Salesman will have to perform the following main activities:

- Plan activities to achieve sales target
- Plan for product distribution
- Optimize resources, work efficiently and adhere to safety standards
- Communicate effectively with customers and colleagues
- Report and review

1.1.2 Ground Rules for Trainees

To ensure an effective and engaging learning atmosphere, all trainees are expected to follow these guidelines:

- **Be Punctual:** Reach the training venue on time and begin sessions as per the allotted schedule.
- **Participate Fully:** Take part in all phases of the workshop and activities with complete involvement.
- **Manage Mobile Devices:** Keep mobile phones switched off, on silent, or in airplane mode during training.
- **Respect Time Limits:** Adhere strictly to time guidelines. For example, if the break time is set for 15 minutes, return to the training room within the given time.
- **Channel Queries Properly:** Direct all questions and concerns to the facilitator. Avoid side conversations with fellow trainees during sessions.
- **Practice Active Listening:** Pay close attention when others are speaking. Listening carefully shows respect and helps in better understanding.
- **Be Curious and Inquisitive:** Do not hesitate to ask questions if you do not understand a concept. Learning is most effective when doubts are clarified.

Notes



Lined area for taking notes, consisting of multiple horizontal lines.

UNIT 1.2: Telecom Industry and its Sub-Sectors

Unit Objectives

By the end of this unit, the participants will be able to:

1. Illustrate the size and scope of the Telecom industry and its various sub-sectors in India.
2. Outline the growth of the Indian Telecom Sector

1.2.1 Introduction to the Telecom Sector in India

India's telecom sector has grown faster than the overall economy in recent years. As of 2025, the country has over 1.2 billion subscribers, making it the second-largest telecom market in the world. Broadband users have crossed 979 million, showing rapid digital adoption.

The sector continues to generate new jobs, especially in sales, supervisory, and managerial roles, driven by 5G expansion, rising data usage, and rural market growth.

Key Segments

- Network & IT Services – building infrastructure and connectivity.
- Service Providers – offering mobile, internet, and digital services.
- Retail & Distribution – ensuring product availability and customer engagement at the ground level.

The telecommunication sector is the backbone of India's digital economy and has revolutionized human communication by delivering high-speed voice and data services. With the rollout of 4G and 5G networks, the industry continues to drive industrial, economic, and social growth.

India is currently the second-largest telecommunications market in the world, with over 1.2 billion subscribers as of mid-2025. Broadband users have crossed 979 million, reflecting rapid internet adoption across urban and rural areas.

The telecom sector contributes significantly to India's GDP and is a major generator of employment. The rollout of 5G, cloud computing, AI, IoT, and big data analytics has created strong demand for skilled professionals. According to the Telecom Sector Skill Council (TSSC), the industry has a demand-supply gap of nearly 28%, especially in areas like 5G, mobile app development, AI/ML, and robotic process automation.

To bridge this gap, TSSC is working to train a world-class workforce and support the growth of telecom manufacturing, services, and distribution clusters.

Key Highlights

- Over 1.2 billion telecom subscribers (wireless + wireline).
- 979 million broadband users, making India one of the largest data markets globally.
- Rising demand for skilled roles in 5G and allied technologies.
- Strong contribution to GDP and new employment opportunities in sales, supervisory, and technical roles.

1.2.2 Top Mobile Handset Players in India

India remains the second-largest smartphone market in the world, with strong competition among global and domestic brands.

Market Share – Q2 2025

- vivo – 21%
- Samsung – 16%
- OPPO (excluding OnePlus) – 13%
- Xiaomi – 13%
- realme – 9%
- Others (Apple, Motorola, Infinix, Nothing, Tecno, etc.) – 28%

Trends & Insights

- vivo leads the market in terms of shipment volumes, performing well both online and offline.
- Samsung dominates the premium smartphone segment (\$800+), followed closely by Apple.
- OPPO and Xiaomi continue to compete head-to-head with strong mid-range offerings.
- realme is growing steadily, targeting budget-conscious consumers.
- Apple maintains a small share in volume but remains one of the strongest brands in the premium category, showing rapid revenue growth in India.
- Other brands like Motorola, Infinix, Nothing, and Tecno are gaining traction in specific segments, adding to the competitive landscape.

India's Smartphone Market Share

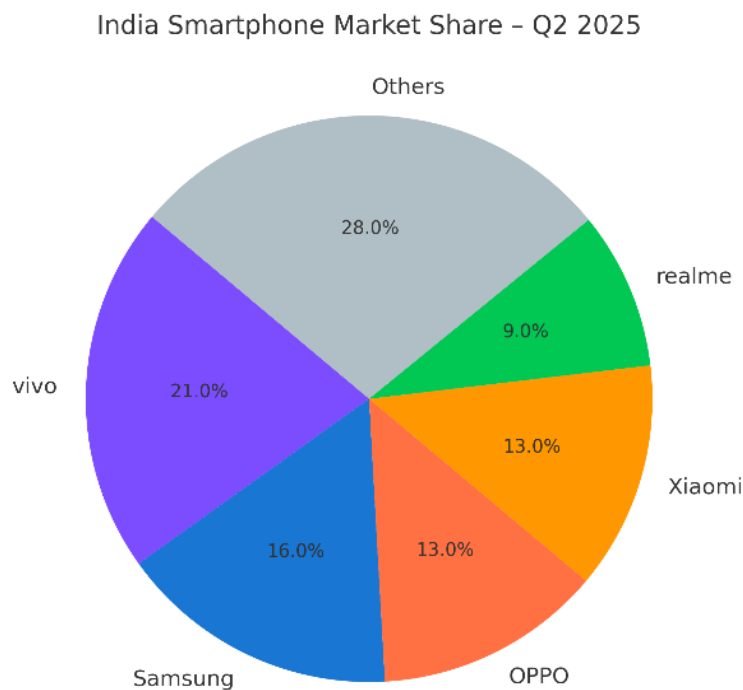


Fig. 1.2.1: India's Smartphone Market Share

India is the second-largest smartphone market globally, with shipments reaching 39 million units in Q2 2025 (+7% YoY). In the first half of 2025, total shipments stood at 70 million units, showing a steady rebound.

Major Subsectors of the Telecom Industry

The telecom industry in India is broadly classified into the following subsectors:

- Infrastructure – Towers, fiber networks, and related facilities.
- Equipment – Mobile handsets, routers, and telecom hardware.
- Mobile Virtual Network Operators (MVNOs) – Service providers that lease network capacity.
- White Space Spectrum – Utilization of unused spectrum for connectivity.
- 5G – Next-generation high-speed mobile network.
- Telephone Service Providers – Mobile and fixed-line operators.
- Broadband – Wired and wireless high-speed internet services.

On a broad outlook, the telecom industry can be divided into three basic subsectors:

Telecom Equipment

Telecom equipment includes hardware and devices that enable communication. This covers transmission, access, and core network equipment such as multiplexers (SDH/STM), carrier ethernet solutions, RF and microwave antennas, repeaters, switches, routers, and testing equipment. It also extends to consumer communication devices like radios, telephones, and computers.

Globally, key telecom equipment manufacturers include Huawei, Ericsson, Nokia, ZTE, Cisco, Ciena, Samsung, and Motorola. India is also emerging as a growing hub for telecom manufacturing under the Make in India initiative.



Fig. 1.2.2: Telecom Equipment

2. Telecom Services

- Telecom services provide voice and data connectivity to consumers. These include fixed-network services (internet retail, data, voice, wholesale) and mobile services.
- Major Indian service providers: Reliance Jio, Bharti Airtel, Vodafone Idea, BSNL, Tata Teleservices.

3. Wireless Communication

Wireless communication refers to the transmission of signals without wires or cables. It includes Wi-Fi, Bluetooth, Zigbee, GPS, satellite TV, and mobile networks (3G, 4G, 5G). Wireless devices range from cordless phones and smartphones to wireless computer components. Wi-Fi is a specific subset defined by IEEE standards and widely used for internet access.

Notes



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UNIT 1.3: Roles and responsibilities of a Telecom Distributor Sales

Unit Objectives

By the end of this unit, the participants will be able to:

1. List the roles and responsibilities of a Distributor Sales Representative.
2. Identify the essential skills required to perform effectively in this role.
3. Illustrate the career opportunities available for a Distributor Sales Representative in the telecom sector.
4. List the daily, weekly, and monthly operations/activities carried out at the site under the responsibilities of a Distributor Sales Representative.

1.3.1 Telecom Distributor Sales Representative-An Overview

Job Description

A Distributor Sales Representative is also known as Distributor Sales Executive/Field Service Executive/ Feet on Street/Field Sales Representative. They are expected to generate sales for mobile handsets and their accessories, steer sales as per the organization's target matrix, increase the depth & width of the distribution network and work in their allocated area as per the Beat and Route Plan. They also handle complaints & queries of retailers and, if required, escalate them to the next level. Apart from this, they are incharge of managing the cash too.

Attributes

A Telecom Distributor Sales Representative should possess the following key attributes:

- Strong persuasion and communication skills
- Effective negotiation abilities
- Good time management skills
- Natural flair for selling
- Ability to work well in a team
- A positive attitude towards challenges
- Willingness to travel as per job requirements

Roles and Responsibilities

The main roles and responsibilities of a Distributor Sales Representative include:

- Generating sales of mobile handsets and related accessories
- Addressing and escalating retailer complaints and queries
- Achieving sales targets as per the organization's goals
- Ensuring stock availability at the distributor point
- Managing cash-related transactions accurately and responsibly
- Credit management and collecting receivables
- Increasing width and depth of distribution network as per the Beat and Route plan
- Pre-sales preparation with respect to route wise beat wise-outlet wise target to be achieved on a daily, weekly and monthly basis
- Being up-to-date with the latest company handsets or accessories
- Preparing daily/ weekly/ monthly reports and submitting them to supervisors

1.3.2 Skill Criteria

Essential Skills for Distributors

Distributors need to demonstrate a wide range of skills to succeed. While the exact requirements may vary depending on the industry and business size, there are some fundamental skills that every distributor should possess:

- **Selling Skills:** A distributor must understand target customers and their needs. They should know how to present products effectively, highlight key features, identify potential buyers, and engage them to drive sales.
- **Interpersonal Skills:** Building and maintaining trust with customers is crucial. Strong interpersonal skills help turn new or “cold” customers into long-term buyers and foster lasting business relationships.
- **Negotiation Skills:** Distributors often negotiate with both buyers and manufacturers. Strong negotiation skills enable them to secure favorable purchase and sales agreements and offer attractive deals.
- **Operational Skills:** Running a distribution business requires sound operational management. These skills include handling employees, logistics, customer service, budgeting, and other functions necessary for smooth operations and business growth.
- **Research Skills:** Market trends change frequently. Distributors should regularly update their research skills to stay current, adapt quickly, and remain competitive in the industry.
- **Communication Skills:** Effective communication is essential to manage sales, distribution, operations, and negotiations. It helps in building better relationships with both customers and manufacturers.

1.3.3 Career Opportunities

A Distributor Sales Representative performs the sales role and is a part of the channel distribution vertical.

They can progress from being a Distributor Sales Representative to Sales Supervisor and then take on future higher roles with a broader span of control such as Territory Sales Manager, Area Sales Manager to Regional Head, State Head and eventually leadership position of National Sales Head as shown in the image.

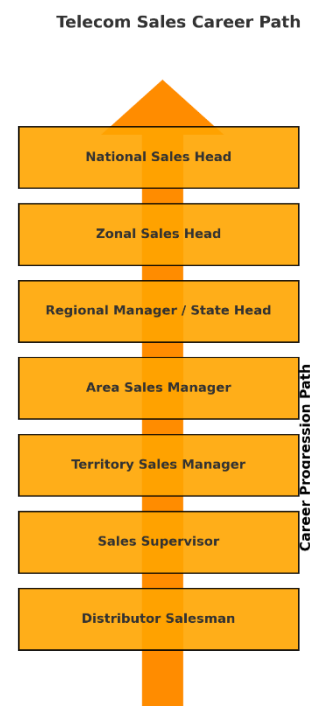


Fig. 1.3.1: Career Progression for a Distributor Sales Representative

Notes



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UNIT 1.4: Distribution and Selling

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the concepts of distribution and selling
2. Elaborate the role of distributors
3. Identify key selling skills
4. Practice different steps of selling

1.4.1 Distribution and Distributors

Distribution Overview Distribution is the process of moving goods from producers to consumers, bridging the gap between production and consumption. It plays a crucial role in business as both a logistics function and an effective marketing tool, ensuring that products reach the right markets efficiently.

Role of Distributors Distributors, often referred to as distribution entrepreneurs, act as intermediaries between manufacturers and customers. Their primary role is to purchase products in bulk from manufacturers and resell them to retailers, dealers, or directly to consumers. With advancements in digital technology, the distribution chain has shortened significantly, making it easier for consumers to place online orders while distributors manage inventory, forecast demand, and handle stock movement across locations.

Importance in the Sales Channel Distributors form an essential part of the sales channel along with dealers and retailers. They:

- Purchase and stock large volumes of products, often at discounted rates.
- Resell products at a markup, generating profits.
- Provide customers access to products from multiple manufacturers, including competing brands.
- Act as a one-stop source for thousands of products.

By operating independently and leveraging technology, distributors can serve customers across regions, ensuring timely product availability and supporting both manufacturers and retailers in growing the market.

Primary Benefits of Distributors

- Manufacturer gains access to the established customer base of distributor organizations.
- Profitably handles small quantity orders for manufacturer's products
- Distributors' revenue flows from the profit margins at which they resell products.

In the electronics business, a typical gross margin on sales is around 20%. Most products are sold from manufacturers' list prices at moderate to large margins. They typically demand and obtain discounts above 30% and even as much as 50% from the unit list price of manufacturers. The sales team are typically paid commissions on the Gross Profits, not by total orders. The sales representative should be aware of margins and skilled at maximizing them. Higher margin products generate higher commissions and thus are of greater interest to the sales representatives.

In most marketing systems, the key factor is distributors. They buy products from various manufacturers and resell them to their customers. Marketing typically sells standard products and financial benefits; they do not sell technical solutions. Distributors usually specialize in one group or product class, such as clothing, food, pharmaceuticals, electronics, etc. Further specialization is also possible in “passive electronic components.” They provide convenience as products of multiple manufacturers are sold through them. Overall revenue generated by customers determines the discounts they get on individual products. The distributor system ensures faster delivery and better terms and conditions than the manufacturer because the latter has one track mind of only focusing on sales. Their customer list includes Original Equipment Manufacturers (OEMs), high-tech distributors, system integrators, retail outlets and end users.

Types of Distributors

1. National Distributors

- Large-scale businesses handling a wide range of products.
- Annual sales often run into crores of rupees.
- A few major suppliers and customers hold significant influence over business decisions.
- Smaller customers and suppliers usually have to follow the policies and procedures set by these distributors.

2. Regional Distributors

- Medium-sized businesses with a comparatively smaller product range and customer base.
- Maintain closer interaction with both customers and suppliers.
- Due to lower volumes, they receive less favorable pricing and limited technical support.
- Preferred by newer or less established manufacturers because of their approachability and flexibility.

1.4.2 Selling

Selling is the art of persuading someone to buy one's product or service. In basic terms, selling is giving or exchanging goods for money. Today, however, with the growth of marketing, selling does not only mean the mere give and take but also refers to the tending of consumer needs. It is the way a sales representative assists a customer, identifies his needs, and motivates him to buy products and services from your business. To be successful, a sales representative needs to make the customer feel they are getting value for money by buying the specific product or service.

Selling Techniques

Common selling techniques used by businesses to fulfil customer needs are:

- Direct selling: Involves direct face-to-face, customer-salesperson interaction
- Retail selling: Involves making products available in a shop where customers can visit
- Agency selling: The supplier hires an agent who then sells products and services on his behalf
- Tele sales: Contact customers by telephone to sell products and services without face-to-face contact
- Door-to-door selling: Potential customers are contacted at their homes by salespeople for direct selling
- Business to business selling: Also known as the B2B model, where direct selling takes place between businesses
- Business to government selling: Similar to B2B, custom-made solutions are developed by businesses and sold to government agencies and departments instead of other businesses

Methods of Selling

- **Mail Order Selling:** Customers are shown a catalog or publication listing products for purchase, without physically seeing them before buying.
- **Online Selling:** With the growth of internet penetration, products and services are increasingly sold directly to customers or businesses through online platforms, ensuring convenience and faster reach.

Importance of Selling

The success of any business depends on its ability to understand customer needs and sell effectively. Selling not only drives revenue but also ensures long-term sustainability. Even the best products will fail if they do not meet customer requirements or reach the intended buyers. Consistent sales efforts help businesses remain competitive, profitable, and relevant in the market.

Steps of the Selling Process

Step 1: Identifying and Prospecting

Prospecting involves searching for potential customers who match the target market or show interest in the company's products and services. This is the foundation of the sales process, as identifying the right prospects increases the chances of successful conversions.

Step 2: Preparation

The sales executive should introduce themselves politely and create a comfortable atmosphere for the customer. A friendly introduction helps in building trust.

Examples:

- "Hello, I'm Ranjan. May I help you choose the phone you are looking for?"
- "This section has a variety of phones for different needs. Let me show you the ones that may suit you best."

Step 3: Approach

At this stage, the focus should be on understanding the customer's exact needs or expectations. Asking the right questions helps to identify preferences and requirements.

Examples:

- "Do you need a phone mainly for clicking pictures or for business use? I can explain the features accordingly."
- "Are you looking for a phone with a front camera flash or without it?"

Step 4: Presenting Products

Once the customer's needs are clear, the seller should introduce the most suitable product. Product knowledge is very important, as it helps the seller explain features, benefits, and price ranges confidently.

Examples:

- "We have a range of mobile phones that exactly meet your requirements. The price ranges from ₹5,000 to ₹45,000, and the key features include..."
- "This model would be a good choice because it offers excellent battery backup."

Step 5: Closing the Sale

- Direct close: “Shall I pack this one, sir?” or “Shall I go ahead and make the bill?”
- Test close: “Do you have all the information to make a decision to buy the phone?”
- The suggestion close: “May I suggest that you go with the matte cover for this phone.”
- Assume close: “How would you like to pay, cash or card?”
- Alternative close: “What will it be, sir, the blue or the white one?”

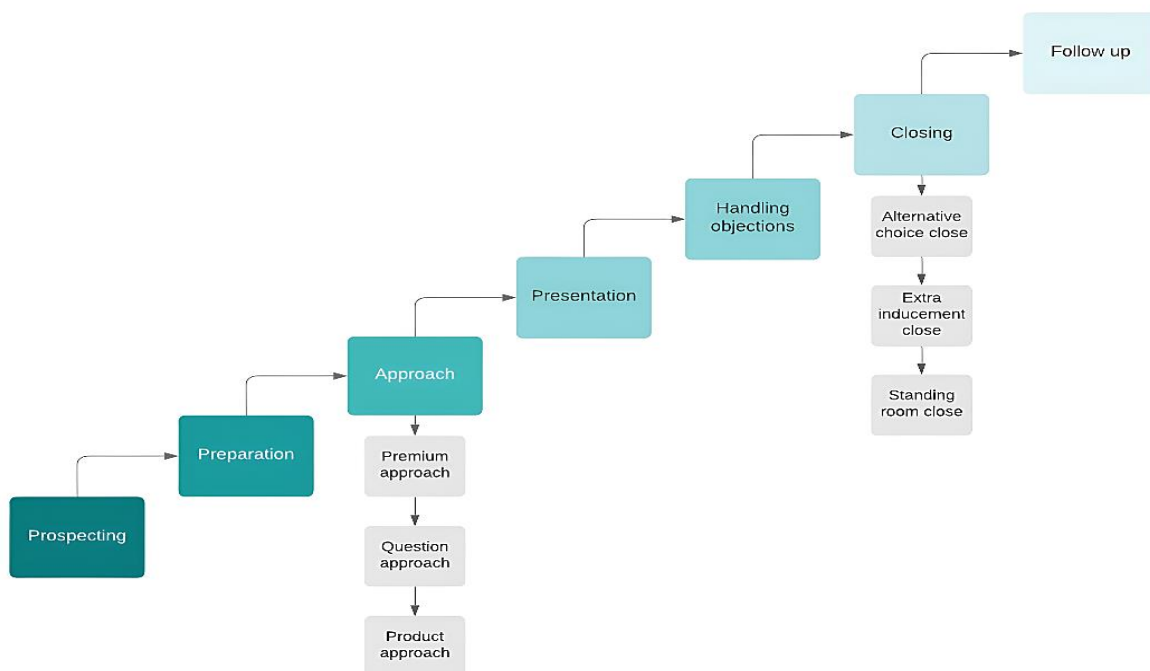


Fig. 1.4.1: The sales process

1.4.3 Marketing Strategies

The organization and processes used by any business to sell its products are called a Marketing System. It implies the identification of prospective customers, establishing business relationships and meeting customer needs by selling solutions and not mere products. Marketing and sales are two parts of customer organizations, including third-party organizations independent of any customer organization. A marketing system operates through sales channels, and a sales channel connects the business to the customer. One or more sales channels could be Direct Distribution, Original Equipment Manufacturer (OEM), System Integrator, Manufacturer's Representative, Value Added Reseller (VAR), and Retail.

A sales channel comprises a single or multiple channel organization with similar work and characteristics. For example, a distribution channel comprises distributors who are third-party organizations and sell products obtained from the manufacturer at a discount. On the other hand, employees of a direct channel are hired by the manufacturer, and they directly interact with customers.

Dominant marketing strategies can be summarized as follows:



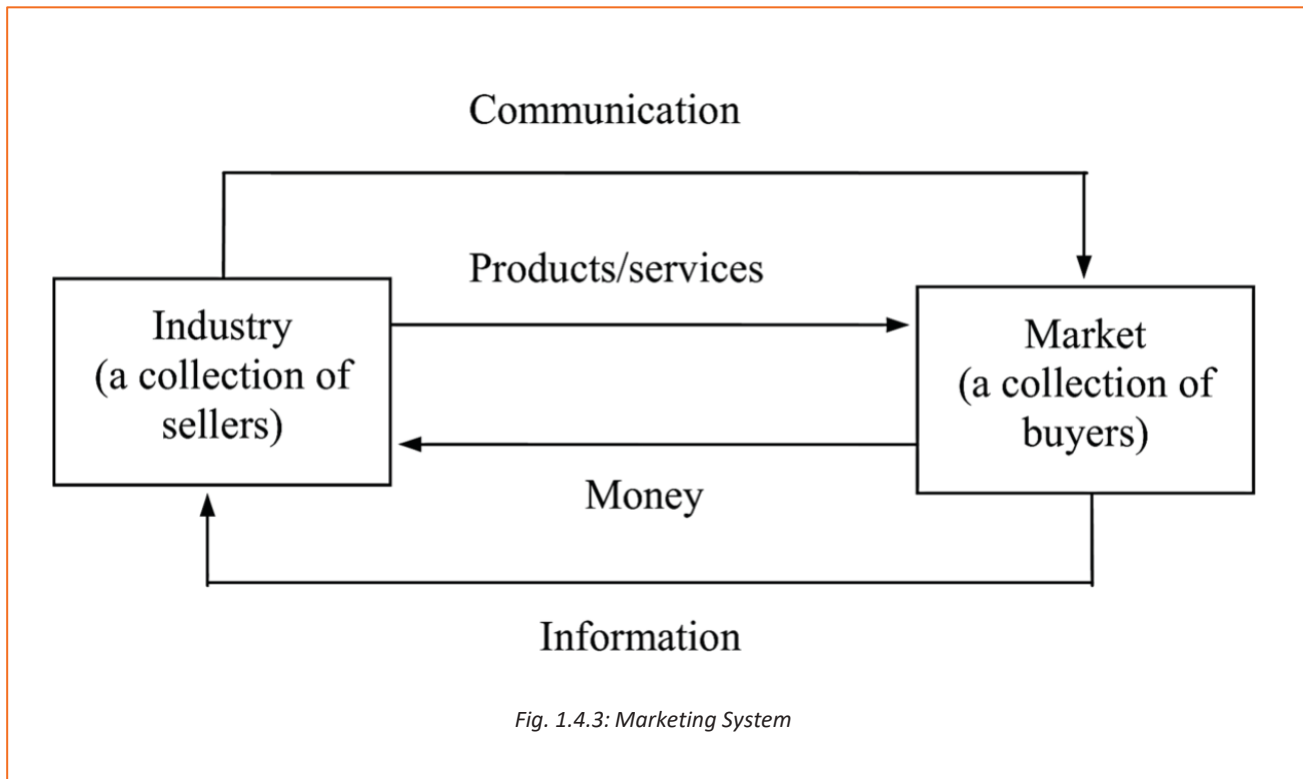
Fig. 1.4.2: Marketing strategies

Key Marketing Strategies in the Mobile Handset Industry

- **Brand Building:** Marketing activities help create a strong brand identity and build customer loyalty among target audiences.
- **Consumer Insights:** Unlike traditional marketing, digital marketing provides real-time, trackable data at every step, enabling quick analysis and better decision-making.
- **Multi-Branding Strategies:** Companies often launch multiple brands within the same product category to capture different consumer segments.

Example: Xiaomi markets both Redmi (affordable range) and Mi (premium range) to appeal to diverse customers.

- **Brand Extension:** Companies leverage the reputation of established brands to launch products in new categories.
- **Examples:** Lenovo introduced smartphones under the Motorola brand; Samsung, known for electronics, expanded into mobile phones.
- **New Product Development:** With changing customer needs, shorter product life cycles, and rising competition, companies continuously develop new products to stay relevant.
- **Distribution Network:** A strong distribution system ensures wider reach and dominance in the market. Companies like Samsung and Xiaomi maintain extensive networks, making them market leaders.
- **Advertising & Promotion:** Promotional activities such as digital ads, social media campaigns, and display advertising help raise brand awareness and connect with target customers.



Notes



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UNIT 1.5: Planning and Organizing the Work

Unit Objectives

By the end of this unit, the participants will be able to:

1. Define the concept of planning
2. Explain the steps involved in planning
3. Outline the basic sales objectives planning
4. List basic sales terminologies

1.4.1 Distribution and Distributors

Planning is something to be done before taking action, i.e., anticipatory decision-making. Planning involves deciding what to do and how to do it before action is required.

The company's strategic plan is the starting point for planning and serves as a guide to developing sound sub-plans to accomplish organizational objectives. It is one of the important organizational management activities used to communicate the company goals and action needed to achieve the desired goals, outcomes and results. It ensures the approach of disciplined effort so that each employee of the organization will work towards the desired goals.

Planning Process

Below are the critical steps involved in strategic planning:

- One should prioritize the objectives
- Accordingly, develop a strategic plan and execute the plan
- Review and revise the plan in regular intervals



Fig. 1.5.1: Strategic Planning Process

1.5.2 Sales Objectives Planning

A company's marketing plan includes sales objectives. The marketing team, as part of sales objectives, identifies common goals. The goals include revenue targets, profit margins, distribution partners, advertising, and targeted demographics. To ensure a common understanding amongst members of the sales and marketing teams, the broad plans are explained and discussed in sales meetings.

The sales objectives are usually divided into yearly, quarterly, monthly, weekly, and daily. The division of objectives helps the sales teams to plan and achieve targets in a streamlined manner. The Territory Sales Manager (TSM) or the Area Sales Manager (ASM) is responsible for giving sales representatives targets.

Maximum utilization should be done of the time spent with the retailer. Therefore, to meet the sales objectives, the sales representative must have complete information about the products he intends to sell.

Achieving Sales Target- Sales Plan Template

		Q1	Q2	Q3	Q4
Product 1	YEAR PRIOR	\$ 400.00	\$ 350.00	\$ 300.00	\$ 350.00
	SALES GOAL	\$ 500.00	\$ 400.00	\$ 500.00	\$ 400.00
	% OF CHANGE	25%	14%	67%	14%
Product 2	YEAR PRIOR	\$ 400.00	\$ 350.00	\$ 300.00	\$ 350.00
	SALES GOAL	\$ 500.00	\$ 400.00	\$ 500.00	\$ 400.00
	% OF CHANGE	25%	14%	67%	14%
Product 3	YEAR PRIOR	\$ 400.00	\$ 350.00	\$ 300.00	\$ 350.00
	SALES GOAL	\$ 500.00	\$ 400.00	\$ 500.00	\$ 400.00
	% OF CHANGE	25%	14%	67%	14%
Product 4	YEAR PRIOR	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	SALES GOAL	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
	% OF CHANGE				

Fig. 1.5.2: Sample Sales Target

Sales Period Planning

- Use the Cycle Plan (sales period documentation from the sales meeting) to review scheduled activities.
- Define sales period objectives for each outlet (Pre-sales), ensuring clear expectations of selling actions across different territories.
- For each target or objective, include the following activities:
 - Sales and Pre-sales program
 - Promotion program
 - In-store control activities
 - Routine activities to be included regularly
- Any challenges or obstacles expected in achieving these objectives should be discussed openly with your TSM/ASM.

Weekly/Daily Planning

- On the last working day of the week, track upcoming visits in an Excel sheet or sales planning file/application (if available).
- Before starting daily visits, review and update the plan.
- Based on the sales period activities, review in-store objectives, such as:
 - Meeting pre-assigned sales targets
 - Ensuring product distribution (presentation of new products)
 - Product placement (e.g., planogram proposals)
- The results should be compared with the sale objectives and reviewed daily and weekly. The visits for the period should be planned accordingly.

A vital part of pre-planning is that a sales representative must always be aware of the latest schemes and offers provided by distributors, along with complete knowledge of all phones being distributed, both old and new. Being unaware of these details can damage the company's image and create a negative impression with retailers or clients. To avoid this, the sales representative should carry the latest company brochure or leaflet containing information on existing phones and offers, as well as brochures for upcoming models if available. Before starting daily visits, the representative must also collect the required stock and merchandise from the distributor's office. A checklist is usually provided to ensure accuracy, and it is important to verify that all items collected match the checklist before commencing activities.

S. No.	Item	Availability
1	Presenters (sales folders, samples, planogram proposal, etc.)	
2	Promotional Programme	
3	Stickers – Price	
4	Price List	
5	Sticker Free Samples	
6	Order Forms	
7	Camera	
8	POS Material	
9	Product Information/Merchandising Manual	

Table 1.5.1: Sample Checklist

1.5.3 Basic Sales Terminologies

Types of Sales and Distribution Measures

- **Primary Sales:** These refer to sales from the company to the distributor, i.e., the quantity of products purchased by distributors directly from the company. Typically, the Area Manager (AM) and Regional Manager (RM) are assigned targets based on primary sales.
- **Secondary Sales:** These are sales from distributors to retailers. The Territory Sales Manager (TSM) usually has targets linked to secondary sales, as they directly reflect distributor-to-market performance.

- **Offtakes (Tertiary Sales):** These represent sales from retailers to end customers. Although companies generally do not track offtakes directly, they monitor offtake trends to understand product movement at the consumer level.
- **Numeric Distribution:** This indicates the number or percentage of outlets carrying at least one SKU (product variant) of the company. For instance, the reach of a company's product across outlets is measured through numeric distribution.
- **Beat:** This is a distributor salesman's route on a particular day. For example, beat on Saturday is Location A, and beat on Sunday is Location B. If the sales executive visits his/her every beat on every alternative day, all the retailers/stores/outlets in his/her sales territory will be covered in two days. Thus, he/she will visit the same outlet of his/her beat thrice weekly.
- **Weighted Distribution:** The percentage of the sales volume from the served outlet.
- **Stock Keeping Unit (SKU):** This refers to a specific product from a company's range of products. For example, iPhone 13 is an SKU of iPhone of Apple Inc, and Apple has other SKUs of iPhone 13 like the iPhone 13 mini, iPhone 13 Pro and iPhone 13 Pro Max.
- **Sales Representatives (SR) or Sales Officers (SO):** SR/SO can be employed by distributors or companies, depending on company policy, responsible for collecting sales orders from their assigned routes. After collecting sales orders from the outlets of his assigned route, an SR/SO summarises this total order and submits it to the distributor for delivery. Based on this collected order (summary sheet), product delivery happens on the next day by DSR or the Deliveryman of the distributor.
- **Wholesalers:** An outlet of a beat is considered a wholesaler if that outlet contributes more than 50% of sales of that particular beat (this assumption may differ for different companies).
- **Modern Trade:** Supermarkets, Hypermarkets, and Departmental Stores, which predominantly belong to the organised retail segment, are classified as Modern Trade. For example, Spencers, Reliance Mart etc.
- **Trade Schemes or Trade Promotions (Widely Known as TP):** These are schemes that are given out in the market to boost sales from time to time. Trade Schemes are designed for the trade, i.e., Retailers/Wholesalers and Distributors. Trade promotions can be of different types based on the company's needs.
- **Mobile:** A mobile is a device that uses radio frequencies to make and receive telephone calls while moving over any geographical area. It is also a cell phone, hand phone or cellular phone.
- **Product Description:** The product description summarises the product on sale. To make it appealing for potential customers, some dynamic elements are used invariably, although there is no particular way prescribed to describe it.
- **Brochures:** These are informative paper documents that introduce a company or organization's products and services to a target audience. They can be distributed by hand, placed on racks or by mail.
- **Feature:** A characteristic of a service or product (i.e., colour, size, speed, weight, the technology used, knobs and buttons, delivery, technical support etc.) is called a feature.

- **Benefit:** The value or gain from the product or service that accrues a customer may or may not be tangible (usually financial).
- **FAB (Features Advantages Benefits):** FAB is one of the primary techniques used at the presentation stage of selling. It connects the description of a product, its advantages over others and the value that the customer gains.
- **Stock Mix:** It is the combination of products which a company sells or manufactures. The demand for certain products and their profitability determines the stock mix.
- **Sales Target:** The expected performance for an individual sales representative or sales team over a given period is called sales target.
- **Monthly Target:** The monthly target lays down the specific number of sales that the management expects to be achieved or exceeded within a month.

Exercise

Multiple Choice Questions:

1. Which of the following is a key skill of a Distributor Sales Representative (DSR)?
 - a) Painting and designing posters
 - b) Effective communication and negotiation
 - c) Only warehouse maintenance
 - d) Avoiding contact with customers
2. One of the common challenges faced by a DSR is:
 - a) Managing retailer relationships and resolving complaints
 - b) Manufacturing new telecom products
 - c) Reducing taxes on sales
 - d) Creating government trade policies
3. Effective distribution strategies impact business by:
 - a) Limiting product reach to fewer retailers
 - b) Reducing customer satisfaction
 - c) Expanding market reach and increasing revenue growth
 - d) Avoiding the use of technology
4. A DSR ensures customer satisfaction primarily by:
 - a) Delivering defective stock quickly
 - b) Ensuring timely delivery of the right products in good condition
 - c) Reducing retailer margins without notice
 - d) Ignoring after-sales service

Short Questions:

1. Why is the distribution sector considered vital for economic development?
2. List any two competencies that make a Distributor Sales Representative effective in their role.
3. How do effective distribution strategies contribute to better revenue growth?

Fill in the Blanks:

1. The distribution sector acts as a vital link between _____ and _____.
2. Strong communication and negotiation are essential _____ for a DSR.
3. Timely and seamless _____ ensures higher retailer trust and customer satisfaction.
4. One major challenge faced by DSRs is handling retailer _____ and maintaining relationships.

True or False:

1. The distribution sector has little impact on economic growth. ☐
2. A DSR must possess both technical and interpersonal skills to succeed. ☐
3. Effective distribution strategies reduce a company's ability to reach new markets. ☐
4. One of the roles of a DSR is ensuring the smooth delivery of products to retailers. ☐

Notes



Lined area for taking notes, consisting of multiple horizontal lines.





2. Guide Retailers to Achieve Sales Targets

Unit 2.1 - Effective Sales Process

Unit 2.2 - Product Specification

Unit 2.3 - Product Portfolio, Inventory Turnovers and
Return on Investment (ROI)



Key Learning Outcomes



By the end of this module, the participants will be able to:

1. Explain the probing techniques used to identify retailer needs and analyze customer requirements for customized solutions.
2. Demonstrate how to identify retailer needs and requirements, including product preferences, sales trends, and stock levels using CRM tools and direct interaction.
3. Describe the importance of CRM systems in automating sales planning, task scheduling, and generating actionable insights.
4. Demonstrate how to use CRM to streamline sales planning, automate task scheduling, and track progress against targets.
5. Show how to create daily, weekly, and monthly sales plans to achieve predefined targets using market data and CRM insights.
6. Discuss the organizational policies for complying with route and beat plans to ensure efficient sales coverage and task scheduling through CRM systems.
7. Demonstrate how to follow pre-defined route plans and daily beat plans using automated tools for route optimization to save time and increase coverage.
8. Explain the benefits of the feature-advantage-benefit (FAB) approach for presenting product value.
9. Demonstrate how to provide retailers with information on the company's product range, promotions, special offers, and schemes using the feature-advantage-benefit (FAB) approach.
10. Determine the impact of common market trends and competitor activities on sales strategies.
11. Show how to identify new business opportunities in potential territories and expand the retailer network through structured outreach strategies.
12. Describe the principles of storytelling for engaging retailers and improving sales outcomes.
13. Demonstrate how to leverage storytelling techniques to strengthen sales pitches and build retailer relationships.
14. Discuss the methods for calculating retailer return on investment (ROI) and managing retailer stock effectively.
15. Show how to explain the return on investment (ROI) to retailers with minimal investment, high inventory turnover, and the benefits of cross-selling/up-selling.
16. Demonstrate how to check stock availability with retailers and replenish using data-driven recommendations from CRM tools.
17. Show how to collect payment for stock replenishment through efficient and secure transaction methods.
18. Explain common retailer complaints and their typical resolutions.
19. Describe the role of effective negotiation strategies in achieving mutually beneficial outcomes.
20. Elucidate the methods of creating effective brand visibility through merchandising tools.
21. Show how to ensure appropriate brand visibility by displaying merchandising material at retailer outlets.
22. Discuss the best practices for leveraging social media tools for retail promotions and social selling.
23. Demonstrate how to assist retailers in using digital and social media platforms for social selling to enhance customer engagement.
24. Explain the methods of selling, such as line selling and range selling, as per organizational norms and standards.
25. Demonstrate how to compute Month-to-Date (MTD) sales performance to influence and guide retailers to increase their purchase volume.

UNIT 2.1: Effective Sales Process

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the probing techniques used to identify retailer needs and analyze customer requirements for customized solutions.
2. Demonstrate how to identify retailer needs and requirements, including product preferences, sales trends, and stock levels using CRM tools and direct interaction.
3. Describe the importance of CRM systems in automating sales planning, task scheduling, and generating actionable insights.
4. Demonstrate how to use CRM to streamline sales planning, automate task scheduling, and track progress against targets.
5. Show how to create daily, weekly, and monthly sales plans to achieve predefined targets using market data and CRM insights.
6. Discuss the organizational policies for complying with route and beat plans to ensure efficient sales coverage and task scheduling through CRM systems.
7. Demonstrate how to follow pre-defined route plans and daily beat plans using automated tools for route optimization to save time and increase coverage.
8. Explain the benefits of the feature-advantage-benefit (FAB) approach for presenting product value.
9. Demonstrate how to provide retailers with information on the company's product range, promotions, special offers, and schemes using the feature-advantage-benefit (FAB) approach.
10. Explain the methods of selling, such as line selling and range selling, as per organizational norms and standards.

2.1.1 Understanding Customer's Needs

A customer buys a product or service to address a problem or satisfy a need. The adjacent table lists some of these goods and services (including the generic product). These goods and services have been categorised into five groups, i.e., intangibles, deliverables, information, technical support, and financial/business.

The two steps of understanding customer needs are:

- Listen attentively (which we have already discussed)
- Ask relevant questions

Probing:

Probing is the process of asking relevant questions to uncover the retailer's needs. The objective is to uncover the retailer's precise need to gain a deeper understanding and ensure that the retailer states the precise need or a problem.

Good Probing helps to:

- Build trust
- Establish credibility
- Find the need and
- Provide the best possible solution for it

UNDERSTANDING CUSTOMER NEEDS

How to Meet Customer Needs?



Fig 2.1.1: Customer's needs and expectations

Leveraging CRM for Sales and Performance Management

Why CRM is Your Best Sales Tool

A CRM (Customer Relationship Management) system is a digital tool that helps you manage all your customer interactions and sales activities. It's like a smart diary, a to-do list, and a performance report all in one.

Importance of CRM:

- **Automating Sales Planning:** Instead of planning your sales on paper, a CRM helps you see your entire sales pipeline digitally. You can easily track leads, see which stage each deal is at, and prioritize your efforts. This makes your planning faster and more accurate.
- **Automating Task Scheduling:** A CRM schedules your day for you. For example, if you need to call a customer in three days, the CRM will set an automatic reminder. This ensures you never forget a task and can focus on selling.
- **Generating Actionable Insights:** The CRM analyzes your sales data to provide you with useful information, or "insights." For instance, it can tell you which products you sell the most, which customers are likely to buy again, or where you need to improve.

Using CRM to Streamline Your Sales Work

How to use CRM for Sales Planning and Progress Tracking

- 1. Sales Planning:** Open your CRM dashboard. Here you will see your sales funnel (e.g., Leads, Prospects, Closed Deals). This helps you plan your day by focusing on the most important customers. You can add new leads and update the status of existing ones.
- 2. Task Scheduling:**
 - To schedule a call: Find the customer's profile, click "Add Task," select "Call," enter the time and date, and add a note. The CRM will automatically add this to your calendar and send you a reminder.
 - To schedule a meeting: Follow the same steps, but select "Meeting." You can also enter the location and other details.

- 3. Tracking Progress:** The CRM's dashboard shows your progress against your targets. You can see how many calls you have made, how many meetings you have had, and how many deals you have closed. This helps you stay on track and meet your goals.

Creating and Executing Sales Plans

A. Creating Sales Plans with CRM Insights

To achieve your targets, you need a smart plan. The CRM helps you create one using real data.

- **Daily Plan:** Check your CRM for today's scheduled tasks and follow-ups. Focus on closing deals and meeting with high-priority customers.
- **Weekly Plan:** At the start of the week, look at your CRM reports. Which products are selling well? Which customers are ready for a new plan? Use this data to plan which customers to visit and what products to pitch.
- **Monthly Plan:** At the end of the month, review your overall performance in the CRM. What were your strengths and weaknesses? Use this information to set your new monthly target and plan your strategies for the next month.

Following Company Policies with CRM

The Importance of Beat and Route Plans

- **What is a Beat Plan?** A "beat plan" is a company-approved list of customers or areas you need to visit regularly. It ensures that every customer is covered and you are not missing anyone.
- **What is a Route Plan?** A "route plan" is the most efficient travel path to visit all the customers on your beat plan. It saves you time and travel expenses.
- **How CRM Helps:** The CRM has built-in features to help you follow your beat and route plans. It can:
 - Show you the customers you need to visit on a map.
 - Suggest the most efficient route to visit all of them in one trip.
 - Remind you if you have missed a scheduled visit.

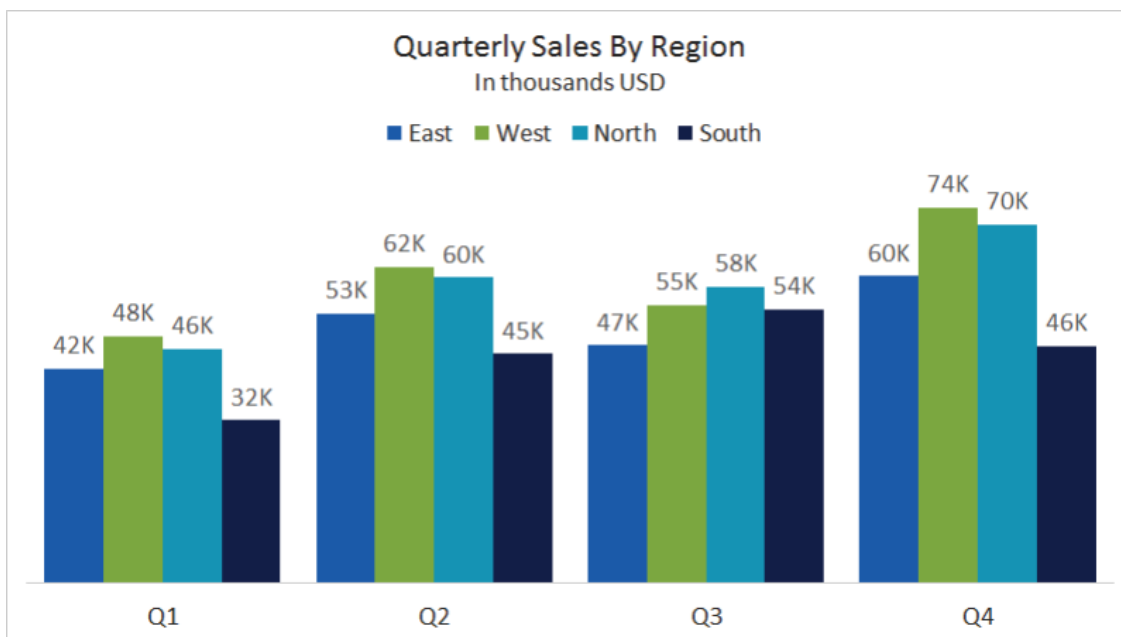


Fig 2.1.2: Sample annual sales target

2.1.2 Strategies to Achieve Sales Targets

As a distributor sales representative, his most important task is maximizing distributorship sales. One way is to sell more handsets and accessories to the retailer. Another factor that can increase sales is by educating the counter salesperson of the retailer to effectively analyse the customer needs and help them increase their sales. If a retailer's sales grow, the distributors' sales will increase.

To reach the highest goal of a business, calculating the targets achieved weekly, monthly or yearly is an important step.

1. Calculate your monthly sales goal

When you're setting personal sales goals or team goals, they should line up with annual sales targets. Find out your monthly sales goal by working backwards from the annual revenue target of your business organization. Once the calculation is complete, determine how much your entire department, teams, and individuals reap to meet that goal. Here it is important to take seasonal or staffing fluctuations into account. If you're employing three new salespeople at a time, you may find it complicated to meet aggressive goals during Q4. This is because the employees may be tied up in training those workers. However, since you've strategized for this, you can choose to alter objectives and try harder in Q3. You should pull it all together in a sales goal chart. For example, you set your target to sell ₹100,000 worth of products by the first day of each month. The monthly sales goal is easy to understand and follow. However, one must not use it so as to make the team stagnant. For example, when you hold the same number each month, it will not be difficult for you to plateau and fall out of speed with overarching profit margins. The target should be to improve this number each month. Otherwise, you can aim to keep the target the same until the department meets it and excels in it. Learn to calculate backward from the organization's yearly target of income. Be confident to introduce any higher-ups who want to provide suggestions on the monthly sales figures they'd like to see from your team.

2. Set waterfall goals

The most interesting waterfall goal system is an interesting process. It operates when the department works linearly toward a targeted goal. This approach is, however, better for morale. It is not a practical idea because when the goals are missed, it can trigger fear and squash motivation. The waterfall method also generates higher quality work and improved numbers. The team will never burn out from the increasing work pressure, and they will even get some time to work on their quality. Get each of your representatives to contribute \$5,000 more every month than their current averages by ramping them up over the scheduled course of the year. Waterfall goals are fantastic for maintaining high team morale and for being quite flexible. If, for example, one of your reps falls a little behind while another exceeds expectations, you can correct their individual numbers accordingly.

3. Sequence goals

This method emphasizes "prioritize your goals." Here one has to detect the goals and bring the highest value when the goals are met. To meet the goals, one has to set a sequence and follow the order. If you're planning towards sequencing goals for a junior sales rep, set goals around where they can improve. Sequencing goals means even if the representatives don't meet every goal, they will target to meet the ones that matter most to the bottom line of the organization or their professional growth.

Here is a sequence sales goal example: “Set up product A demonstrations per week/day.”

For a representative who struggles with the product process, demonstrations would set a goal of giving a department member one demonstration per day. The next step is to improve the speed and set a target to demonstrate twice a week, which would help sharpen their skills.

If a rep has difficulty moving discovery conversations to the next phase, the person can set a goal to complete three demonstrations per week, then four, and then one a day.

4. Set activity goals

An activity goal is defined as a behavioural objective for the sales representative. Such activities generate cash flow, create various opportunities, and develop brand visibility depending on the task assignment.

Here is an activity sales goal example: “Share one sales article each week.”

Sometimes the rep might need to be more visible within your organization. The representative must fix a target of sharing one article per week on the internal communication portal. A better way is to contribute one article each quarter to the company’s blog section.

5. Incentivize goal attainment.

Incentivizing goal attainment is a process to render a specific team with more enthusiasm and encouragement. The team of any department should always be motivated at various levels of achievement. Gaining variable compensation, receiving bonuses, and even continuing their work are all different forms of incentives for employees to meet their quota.

An incentivized sales goal example is: “Hit a retention number greater than Z%.”

When the representatives are easily setting up new business, but the system churns out in three months, it is not a favourable process. The representatives should set goals to close only quality business that matches your line of work. For example, you might give a cash bonus to every representative hitting quota with a retention number higher than a particular percentage.

6. Monitor goal progression

Goals often fail if they are not tracked. Monitoring progress is an inevitable step, and it can be done via the dashboard. The representatives or employees can also enter their weekly numbers in the conventional Excel spreadsheet. If some people in the team fail to hit their weekly numbers, it is better to talk to them before it becomes an obstacle to meeting their specified monthly quota.

Tracking these minor goals makes them worth the added implementation time. As a result, monitoring goal progression is an important step. It is essential to speed up the sales process, close deals quicker, and ensure that the company realizes the revenue faster.

The sales representative will have extra time to spend on other deals and prospecting activities. Developing a goal to lessen the amount of time it takes to move a lead to an opportunity to a client will speed up the sales cycle.

7. Set stretch goals

A stretch goal is a defined goal exceeding the primary goal of the representatives, which can be effective. Think about the old yet common saying: “Aim for the moon. If you miss, you’ll be among the stars.” Hold the fact that this isn’t right for everyone. If a representative struggles to meet their quota each month, a stretch goal will only trigger their anxiety. But if one has a high performer, set realistic stretch goals that will challenge and motivate them.

Stretch Sales Goal Example: “Upsell 12X more customers than you did the previous month.”

A stretch goal pushes your high-performing team — or, at least, your highest-performing executive — to do their best work by putting an apparently unattainable goal before them. Remember, you should only suggest stretch goals if your team already exceeds expectations. If they’re still progressing toward the primary goals, it would be wise to use another type of goal to motivate them and track their progress.

8. Suggest mentor goals

If a representative finds it difficult to ramp up, it should be dealt with carefully. It is a phase that every working professional goes through. They should find the right mentor in such cases. They should form a framework under the guidance of their mentors. They would inevitably thrive under the mentoring of the right manager.

Mentor Sales Goal Example: Attending a monthly professional development program.

If the employee does not attend professional development programs, the representative can set a different goal to start every month. It is an easy way for them to obtain mentorship needs from experts in the industry.

9. Create a collective goal

A collective goal is defined as a specific objective co-created by an entire team. It is developed to focus on and achieve X amount of revenue or Z% client retention.

Collective Sales Goal Example: “Mark the most meetings of any salesperson in the team.”

Arrange friendly competition by challenging teammates to see who can mark the maximum number of meetings or provide demonstrations in a particular week. One can even post the numbers up on a leaderboard to make it eventful, and it will not only highlight the top sales representatives but also act as encouragement.

2.1.3 FAB Technique

Identifying the various features, advantages, and benefits of a product or service is essential for effective marketing and sales messages. The FAB Statements can explain the reason why a particular company should buy the products:

FAB stands for Features, Advantages, and Benefits. FAB statement describes the features, its uses (the advantage), and the benefits it brings to the potential consumer.

- The easiest things to classify are the features. They are particulars or appearances of businesses/ products/ services. E.g., a “phone with Gorilla glass 3” is a feature.
- Advantages can be described as the usage of the features. These are accurate and are not related to the needs of prospects. For example, “screen can be protected from scratches by gorilla glass.”
- Benefits can be explained as value to advantage, and it connects the facts about the product to a solution for the client. For example, “when one is travelling or have a lot of change or keys in their pocket along with their phone, the Gorilla glass will make sure the phone’s screen remains scratch-less and clean.”

Using FAB Statements

To start compiling a product/service into a compact marketing & sales message, we need first to identify the various features, advantages, and benefits that will flow. The FAB Statement method helps connect with possible future clients, thus increasing business results. The following steps can be followed to create FAB Statements:

- STEP 1: List all the features of a product. Then add advantages and benefits later.
- STEP 2: Return to the list of features and write down one or two advantages of each feature.
- STEP 3: Think like the prospective client, like the phrase, “Get into his shoes”, and for each advantage that exists, develop a value statement.

Some sales representatives are known to start with the benefits that will accrue and then go on to explain the features and advantages resulting in the said benefit. It all depends on the type of customer one encounters.

The FAB technique allows a salesperson to demonstrate the important features of a product and clarify how they can be important to the buyer. To remain focused on features, a DSR must concentrate on showing or demonstrating the major characteristics of the product/service. Each feature’s advantage will reveal why that particular feature makes the product better or more useful. The benefit that accrues to the customer depends on the advantage of that feature to the buyer, such as safety, time savings, or personal enjoyment.

To generate sales, it is important to concentrate on customers’ needs. The metallic body parts and advanced functions may excite the sales staff, but to the customers, what they get from buying the specific company product compared to the competition is more important. The benefits to the customers should be the main point of a product-focused sales approach.

2.1.4 Beat Planning

Beat planning is also termed a Permanent Journey Plan (PJP). It is a day-level route plan created for field sales/marketing personnel to visit multiple stores at a predetermined frequency. A beat plan clearly defines whom to visit and when to visit, depending on the company’s priority for the store’s category.

Effective beat planning is necessary for FMCG retailers and brands. It is important to maintain stores sufficiently stocked, keep in-demand merchandise available, and refill them regularly. Sales beat planning is usually done manually, and while handling multiple locations and several product categories, it faces some serious real-world challenges.

Unorganized, incomplete, and inappropriate addresses of retail outlets are a major issue while planning sales beats. Poor communication between retail storekeepers and warehouse managers may also lead to improper beat planning. Mapping specific vehicles to a specific category of products and geographical regions is another part of the planning process.

On-ground limitations such as the salesman's geographical understanding, traffic congestion, and route restrictions can disturb a permanent journey plan. Sales representatives often face the difficulty of unfair load balancing in terms of the number of retailer visits, time spent, and distance travelled on the road.

Manage Planning

Download BeatPlan

Select team lead: Ankur Garg

Select the month: August 2018

Routes	Sales Rep	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7		
		W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F		
Khan Market	Vibhor																																								
New Foundation Store	Vibhor																																								
New MG Road	Vibhor																																								
New MG Road 0	Vibhor																																								
new Route	Vibhor																																								
New Route-1	Vibhor																																								
Nirman Vihar	Vibhor																																								
Race Course	Vibhor																																								
Shantivan	Vibhor																																								
sowred prd	Vibhor																																								
test route anoop	Vibhor																																								
Vibhor's Route	Vibhor																																								

Fig 2.1.3 A sample beat planner

How to work as per beat plan before going to the field

An operative beat plan or a personal journey plan is one of the most important parts of sales and distribution management since it forestalls waste of time and effort. The distinct territories guarantee there is no overlap between field force executives and that they are aligned to concentrate on their outlets and generate business, which is the organisation's end goal. This beat plan or personal journey plan. This plan should be insightfully implemented to such an extent that business objectives properly fit in with resource capabilities to achieve revenue scores.

It is very often to see that a field sales executive misses the sales target even when the best resources and support are provided to them. On breaking this down further, we find that sales managers recognize PJP or personal journey plan as one of the causes that require to be revisited.

Some offers are the option of assigning the route plan to the field executive. Even a field executive can upload a PJP and request the manager to approve it. The plan makes sure that the route plan is strictly adhered to by monitoring the location of the field executive along with geo-verified tasks. The route planner helps the field executives to optimize their visits and cover larger business regions in a similar business time. The people working on the plan have got the experience of working with various kinds of businesses and hence believe the following must be taken care of while designing a route plan:

Divide your business region

Depending upon their nature of business, organisations divide retail stores depending on location, client profile, same item needs or size of the retailer.

Route Planning

Once the region distribution is finished, managers can dispense time to every one of their field visits and build up a powerful route map for the week that covers the whole rundown of outlets to be secured.

Delegate

While making the route map, managers must consider the special abilities of each field executive and match them to the regions that are progressively reasonable for them. This includes their network with the retailers, past retail experience and individual qualities. Their route map must mirror the same if they have created solid connections in a specific domain.

When creating a new route plan, it is better to learn from the mistakes of the past:

- Under-utilized salesmen/marketing executives
- Productivity needs to be increased within the same working hours
- Long and cumbersome Beats – A sales executive walks for a significant time in his beat. Hence, it's unfair to expect high productivity throughout
- Overlap in salesmen routes – With overlapped routes, salesmen were walking more than they had to. The time spent transacting at every outlet was taking a hit resulting in potential revenue loss

2.1.5 Range Selling and Line Selling

Range Selling: Range Selling is a marketing strategy where a business offers a larger portfolio of products and services instead of relying on just one or a few products. By selling a variety of products, companies reduce dependency on a single product line, improve visibility in stores, and increase overall sales. It is one of the most effective techniques for driving growth in competitive markets.

Importance of Range Selling

- Sales Gain: More SKUs sold per outlet results in higher business.
- Distribution Gain: Coverage of more outlets across the territory.
- Range Expansion: Increases the number and types of products sold.

Tips for Effective Range Selling

- Know your markets thoroughly.
- Provide excellent service to all retailers.
- Avoid distribution gaps, as they allow competitors to grow.
- Ensure strong product visibility inside the outlet.
- Open new outlets to expand distribution reach.
- Maintain sufficient and timely supply to avoid sales loss.
- Keep track of new brands/packs and promote them.
- Use shelving/displays effectively because displays drive sales.
- Focus on market development rather than only easy sales.

Line Selling: Line Selling refers to the practice where sales representatives sell in a straight line, focusing directly on achieving the outcome of their interaction—closing the sale—rather than engaging in a longer process of qualification or relationship building. This approach emphasizes immediate results from each sales interaction.

In line selling, more SKUs are sold per outlet resulting in a gain in the business.

Example:

If the average value of one SKU is Rs 100 and if only one new SKU is sold more per outlet per visit, and if a Distributor Sales Representative has 200 outlets, the Increase in Value Sales (Sales Gain) = 100×240 = Rs. 24,000 per month.

This will help in achieving targets.

2.1.6 How a Company Differentiates its Products from Competitor's Products?

Competitive differentiation is the process in which a company's product or service is clear from the one that its competitors offer. It is based on the factors that the consumers value, including functionality, brand, pricing, or customer service. The role of marketing is to ensure that potential buyers can comprehend what sets an offering apart.

Gaining a competitive advantage is essential in a crowded marketplace. With many distribution channels and promotional campaigns competing for customers' attention, you must find a way to stand out from the competition. Competitive differentiation involves more than outdoing competitors' products. Ideally, it entails creating a holistic business model that allows customers to view you as the superior business along multiple criteria for comparison.

How to differentiate from competitors?

- Conduct market research
- Perform competitive analysis
- Synthesize and adjust
- Follow through with appropriate marketing
- Evaluate periodically

Competition benchmarking

Benchmarking against competitors means collecting data on the performance of similar products and comparing them against your product sales performance. This information can be used to identify marketing and sales flaws of your organisation, underperforming marketing strategies, identify areas to improve business and discover new growth plans. This helps in understanding the position of your products viz-a-viz industry leaders, and also the industry average, and specific competitors

Steps for Competition Benchmarking

- Check the stock and highest-selling SKU/ product categories of the retail outlet.
- Check the competition stock status in the outlet
- Collect the available stock of your products and update that in the handheld device/stock record book.
- Check the SKU wise category and another competition brand in the outlet.
- Prepare a comparison of similar SKUs of competitors and their own products
- Prepare an overall estimation of the sales volume of competition SKUs and your SKUs
- Identify the overall proposed order as per the above information.
- Evaluate and share the proposed order with the retailer

Notes



Lined area for taking notes, consisting of multiple horizontal lines.

UNIT 2.2: Product Specification

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain how to understand the customer's need.
2. Elucidate the range of relevant products and services, including key features, technical and non-technical specifications of mobile phones and accessories.
3. Demonstrate how to pitch the product as per customer's need
3. List the product specifications of the mobile handset
4. Identify various technical and non-technical specifications
5. Explain product specifications to the customers
6. Discuss how to answer product related queries

2.2.1 What are Customer Needs?

Customer needs are defined as the essential and influential factors that trigger them to buy a particular branded product or service. In order to classify customer needs, it is crucial to understand the reasons behind the strategies in their decision-making.

To comprehend customer needs better, it's very important to identify your customers. By determining your target audience and segmenting them based on their field, industry, or other attributes, the businessmen clearly see their selling proposition and detect the customer needs.

Types of customer needs

Customer needs can be broadly classified based on customers of the market demographics. Customer needs can be broadly classified into two verticals: Product Needs and Service Needs.

1. Product Needs

Product needs are directly related to the product itself. If the product aligns with customer expectations, they are more likely to purchase it; if not, they may reject it. Key attributes include:

- Price: Customers usually have a set budget for purchasing a product.
- Features: Buyers look for features that solve their problems and ensure reliability.
- Effectiveness: The product should simplify processes, save time, and deliver value.

2. Service Needs

Service needs reflect the emotional expectations of customers. Meeting these effectively gives a business a competitive advantage and builds lasting loyalty. Important aspects are:

- Empathy: Customers prefer brands that serve with care and understanding.
- Clarity: Transparent communication on pricing, warranty, refund policies, etc., builds trust.
- Information: Customers expect guidance and information from the first interaction until the final purchase.

Find out below four easy-to-follow steps to know the way you could meet customer needs successfully

- Detect – Business organizations analyse customer needs through surveys, interviews, focus groups, or social media platforms.
- Distribute – Once detected the needs, the business organization can distribute it across the right teams and departments.
- Create – Customize product features, and create detailed content that talks about customer needs.
- Collect – Get ahold of customer feedback regularly to learn how your efforts meet their expectations.

2.2.2 Need for Product Specification

All products have certain specifications that are the identity of the product. Specifications may be defined as the technical and non-technical features of the product given in detail by the manufacturer. These specifications outline the various components used in the product, like processor, RAM, screen, display, camera, etc. A salesperson should be aware of the specifications of all the products they are selling, as a customer or client may ask any related questions.

2.2.3 Product Specification of Mobile Phones

Mobile phones or cell phones are wireless devices which receive signals from towers. The area (several miles) around a tower can typically be called a cell, and this is what receives the signals. Anyone can use their cell phones for a lot of purposes besides just voice calls, and a few such purposes are listed below:

- Store contact information
- Send or receive email
- Send SMS (text message)
- Access the internet to get information (news, stock quotations and entertainment)
- Make tasks or to-do lists
- Track appointments by setting reminders
- Watch TV
- Play games
- Carry out simple math operations using the built-in calculator
- Integrate optional devices like speakers, MP3 players, GPS receivers, PDAs, etc.

Almost everyone these days has a mobile phone. A very high proportion of these has a high-end smartphone or device, such as an iPhone, Windows, or Android phone. Smartphones are computing devices in their own right, and they commonly have touch screens and built-in dual cameras, allow internet access while on the move and allow users to download applications from the mobile 'App' store.

Some commonly associated terms with mobile phone specifications are explained below:

1. 1G:

1st generation wireless: Cell phones and wireless telephone's first-generation technology. These were introduced in the 1980s and were the analogue phone standards that continued until the 2G digital cell phones were replaced.

2. 2G (Second Generation)

- Commercially launched in 1991.
- Used digital encryption for speech, making it more efficient in spectrum usage and increasing mobile penetration.
- Introduced basic data services, with SMS being the first.
- 1G systems were retrospectively named once 2G was introduced.
- Radio signals: 1G = analog, 2G = digital, but signalling between towers and phone systems remained digital in both.

3. 5G (Second and a Half Generation)

- A bridge between 2G and 3G.
- Added packet switching domains to the traditional circuit-switched system.
- Mainly a marketing term, not a formal generation.

4. 3G (Third Generation)

- Succeeded 2.5G, based on ITU's IMT-2000 standards.
- Improved spectral efficiency for greater network capacity.
- Enabled advanced services: broadband data, video calls, wide-area voice telephony.

5. 4G (Fourth Generation)

- Marked a major evolution beyond 3G, fully IP-based.
- Offers voice, data, and multimedia "anytime, anywhere."
- Provides speeds between 100 Mbit/s and 1 Gbit/s, with premium quality and high security.
- Reliance Jio was the first entrant in India with 4G.

6. AMOLED (Active-Matrix OLED)

- A type of OLED display with a transistor at each pixel for faster response times.
- Ideal for videos and smartphones, making it the most common OLED display in phones.

7. Bluetooth

- A short-range wireless technology for creating PANs (Personal Area Networks) between nearby devices.
- Enables hands-free operation, file sharing, and printing via Bluetooth-enabled devices.

8. Capacitive Touch Technology

- Detects the electrical properties of the human body.
- Sensors can be embedded over a large surface to detect finger position.
- Responds only to human touch, not to gloves or styluses.

9. CDMA2000

- A hybrid 2.5G/3G technology using CDMA (Code Division Multiple Access).
- Allows transmission of voice, data, and signalling (like dialled numbers) between phones and cell towers.

10. EDGE

- It stands for Enhanced Data for Global Evolution and is an upgrade for GSM/GPRS networks that triples data rates (speed) over standard GPRS. Although the EDGE is faster than GPRS, it is not as fast as 3G technologies such as HSDPA and EVDO

11. EVDO

- 1xEV-DO (EVDO) is a 3G standard for CDMA-based networks. As a 3G technology, it focuses on bringing high-speed data to CDMA networks. EVDO provides data rates over 10 times faster than 1xRTT, the previous data technology for CDMA networks. It is not as fast as the newer LTE 4G standards.

12. Fingerprint reader

- It is a piece of hardware that senses/reads a person's fingerprint. As fingerprints are unique to a person, they verify a person's identity and can also be used instead of passwords, whether for confirming financial transactions, unlocking phones, or some content or service.

13. Flash memory

- Memory chips are practised to store information. Because these don't need electrical power to remain on, it is a popular form of memory for removable and internal memory cards, as the stored data can be retained even when the device is turned off. Widespread flash memory cards include SD and microSD.

14. Full HD

- A term for 1080p is the better of the two main high-definition standards: 720p and 1080p.

15. Geo-tagging

- Correlating a geographic location with photos or other items is called geo-tagging. Phones with a camera and GPS can accurately implant the location from a picture. Few online photo services can recite that data and display a map showing where the photo was taken.

16. GHz

- Gigahertz: It is a measure of the frequency and is commonly used to describe audio and radio frequencies. One hertz is defined as the number of cycles occurring per second, and 1 GHz is equal to one thousand million Hertz.

17. GPRS

Short form for General Packet Radio Service, it enables data communications using packet-switched technology. Data applications including MMS, WAP (wireless internet) and software connecting to the internet use GPRS. Basically, any network connection that is not voice or text messaging uses a data connection like GPRS. It offers theoretical data speeds of up to 115 Kbits/s, a tenfold increase over previous (circuit-switched) technologies, although actual achieved in the real world is around 30-40 Kbps.

18. GSM

Global System for Mobile Communication: Standard for all mobile phones. Its easy accessibility made international roaming public between mobile phone operators, allowing the user to use phones around the world.

19. LTE

Long-Term Evolution: 3rd Generation partnership project started in late 2004. The idea was to notch up the mobile communications systems, allowing them to compete with emerging broadband technologies, mainly WiMAX.

20. MMS (Multimedia Messaging Service)

- An extension of SMS that allows sending photos, graphics, audio, video clips, or longer text messages (within size limits).
- A direct evolution of SMS.

21. Mobile Hotspot

- A device that creates a small Wi-Fi coverage area.
- Allows nearby Wi-Fi-enabled devices to connect to the internet through a cellular network.

22. MP3 (MPEG Layer 3)

- A widely used file format for music and audio content.
- Compatible with PCs and portable devices.

23. Multi-core Processor

- A processor with two or more cores (dual-core, quad-core, etc.).
- Improves performance by handling multiple tasks simultaneously.

24. Multi-touch

- A touchscreen feature that detects multiple finger touches at the same time.
- Example: Pinch-to-zoom (spreading fingers to zoom in or pinching to zoom out).

25. NFC (Near Field Communication)

- A short-range wireless connectivity technology.
- Enables quick, secure, two-way interaction between devices (e.g., phone payments with NFC chips).

26. Nano-SIM (4FF SIM)

- The 4th Form Factor SIM card, physically smaller than both the traditional SIM (2FF) and Micro-SIM (3FF).

27. OS (Operating System)

- System software that manages hardware and software resources of a device.
- Hosts applications and allows multitasking.
- Examples: iOS, Android, Windows.

28. OLED (Organic Light-Emitting Diode)

- Next-generation display technology made of organic polymers that emit light when electrically charged.
- Available in single-colour, multi-colour, and full-colour formats.
- Sometimes called LEP (Light-Emitting Polymer).

29. Optical Zoom

- A camera zoom feature that uses moving lenses to magnify subjects.
- Provides higher-quality close-ups compared to digital zoom, which simply enlarges pixels.

30. OTA (Over-The-Air)

- Refers to downloading/uploading content or software via a wireless network.
- Often used to describe FOTA (Firmware Over-The-Air) updates for smartphones.

31. Pixel

The smallest visual unit in an electronic display or visual data file; is a single “dot. Each pixel can be turned on/off and dimmed in case of full-colour displays. In other words, each pixel is controlled individually. The vital measure of an electronic display is the number of pixels. The more pixels, the better the details and this is called “resolution”, typically stated in vertical and horizontal pixels (such as 240 x 320).

32. Proximity Sensor

A sensor that detects when another object is close by. In a handset, a proximity sensor is most commonly used to detect when the phone is held to the face. The sensor detects an area of skin of a certain size within a certain distance in front of the speaker area at the top of the phone. The phone uses this information to temporarily turn off the display to save battery life and the touch screen to prevent the face from accidentally touching on-screen buttons and triggering unwanted actions.

33. RFIDs

Also called a Radiofrequency identification device is a tag that can be fused into a product, animal, or person for identification and tracking through radio waves. It relies on data stored and retrieved through radio frequency tags or transponders.

34. Resistive touch screen

This particular technology works by sensing direct pressure. It is frequently used in touch-screen displays and activated by pressing with a finger/stylus. A resistive touch screen has a touch layer on top of a standard display, which contains electrical layers separated by a small distance. Unlike capacitive technology, resistive technology can work with a stylus and gloves.

35. SMS

Short Message Service is a communications protocol allowing the interchange of short text messages between mobile devices.

36. Stylus

A small pen-like instrument is used for “writing” on a touch-screen device.

37. UHD

Short for Ultra HD. Image (primarily video) resolutions greater than full HD/1080p. These include 4K and 8K.

38. USB Type-C

A specific physical USB connector. It is expected to replace micro-USB and can also replace full-size USB connectors in any device where a smaller connector is beneficial. Like most USB connectors, Type-C carries both power and data. It is used to charge a mobile device battery; it can also provide a wired data connection to another device, such as a computer or TV. A Type-C connector is similar in size to micro-USB but contains several upgrades. Different from a micro-USB, it is reversible, meaning it can be plugged in “either way.” Type-C USB also supports higher data speeds and larger amounts of power (enough to charge a laptop computer.)

39. VoLTE

Short for Voice over LTE (Long Term Evolution). Most LTE networks worldwide had initially launched networks that support only data service. A stop-gap technology known as CSFB allows phones to use LTE for data and other 2G or 3G networks for voice. VoLTE will allow LTE (4G) networks to replace 2G and 3G networks completely.

40. Wi-Fi

Wi-Fi is a Wireless Local Area Network (WLAN) technology. It principally offers short-range and high-speed data connections between mobile data devices (laptops, smartphones, etc.) and nearby Wi-Fi(router) access points.

- **Form Factor:** Major layouts of components, its position, style, shape and size of a phone are called form factors. Major three types of such factors are listed below:
- Bar phones: A bar (also known as a slab or block) has the shape of a cuboid, usually with rounded corners and/or edges. The name is given due to the coarse resemblance to a chocolate bar. Major phone providers use this form factor (like Motorola X, iPhone, Samsung Galaxy Note, etc.) A touchscreen or slate phone is a subset of the bar forms that has few physical buttons, instead relying upon a touchscreen and an onscreen QWERTY keyboard. Most modern-day phones fall under this category.



Fig. 2.2.1: Bar phone

Flip phones: A flip or clamshell phone has sections which are connected by hinges, allowing the phone to flip open and fold. These phones were very popular in the 1990s and early 2000s.



Fig. 2.2.2: Flip phone

Sliders: A slider or slide phone has two or more sections sliding each other on rails, and the blackberry torch is a famous example of such a phone.



Fig. 2.2.3: Slider phone

Notes



Lined area for taking notes, consisting of multiple horizontal lines.

UNIT 2.3: Product Portfolio, Inventory Turnovers and Return on Investment (ROI)

Unit Objectives

By the end of this unit, the participants will be able to:

1. Determine the impact of common market trends and competitor activities on sales strategies.
2. Show how to identify new business opportunities in potential territories and expand the retailer network through structured outreach strategies.
3. Describe the principles of storytelling for engaging retailers and improving sales outcomes.
4. Demonstrate how to leverage storytelling techniques to strengthen sales pitches and build retailer relationships.
5. Discuss the methods for calculating retailer return on investment (ROI) and managing retailer stock effectively.
6. Show how to explain the return on investment (ROI) to retailers with minimal investment, high inventory turnover, and the benefits of cross-selling/up-selling.
7. Demonstrate how to check stock availability with retailers and replenish using data-driven recommendations from CRM tools.
8. Show how to collect payment for stock replenishment through efficient and secure transaction methods.
9. Explain common retailer complaints and their typical resolutions.
10. Describe the role of effective negotiation strategies in achieving mutually beneficial outcomes.
11. Elucidate the methods of creating effective brand visibility through merchandising tools.
12. Show how to ensure appropriate brand visibility by displaying merchandising material at retailer outlets.
13. Discuss the best practices for leveraging social media tools for retail promotions and social selling.
14. Demonstrate how to assist retailers in using digital and social media platforms for social selling to enhance customer engagement.
15. Explain the methods of selling, such as line selling and range selling, as per organizational norms and standards.
16. Demonstrate how to compute Month-to-Date (MTD) sales performance to influence and guide retailers to increase their purchase volume.

2.3.1 Latest Trends in the Handset Industry

Customers these days want handsets with the latest features. It is one of the key motivators well above price, while another driver has been the prevalence of OTT apps and the want to consume them.

Two out of five smartphone customers intend to purchase a handset costing Rs 30,000 or more, with a higher tendency among the 35-44 age group to do so. Over 53 per cent of smartphone users use their gadget for more than four hours a day, while one out of three people living in metros also owns a smartwatch or a fitness band. A research has also found that men are more brand conscious and have twice the share than women in the Rs 50,000 and above smartphone segment, while women appear price and deal-conscious and have more share in the Rs 10,000 segment.

Source: Zee5 Intelligence Monitor report

Over the last two decades, we have witnessed extraordinary growth in digital penetration and its crucial impact on our daily lives. Smartphone companies offer premium phones, affordable flagships, and mid-range devices with high-end features, an unprecedented push for 5G access, slimmer designs, better cameras, and contemporary ergonomics. With rising social media awareness, OTT consumption on the go, and work and study from home, the smartphone industry is evolving to cater to the customer's needs.

Let us look at some of the trends that are currently dominating the smartphone industry:

- **5G Technology:** The buzz around the 5G network in India is at an all-time high, with consumers, smartphone manufacturers and service providers eagerly waiting for the 5G experience. As download and upload speeds increase with 5G, expect smartphone manufacturers to leverage cloud storage, improve battery consumption and create an upswing in mobile-friendly OTT content. It will change the network landscape and shift from smart homes to smart cities.
- **Faster Processor:** The processor is the central hub of your smart phone. It receives and executes every command, performing billions of calculations per second. The effectiveness of the processor affects every application you run. The current generations of smartphones come in a range of multi-core processors. Most commonly found are dual-core (two), quad-core (four) and octa-core (eight), with the latter being the most powerful. Some processors also come with Hexa-core (six), but they are rare. Bionic, Snapdragon, Exynos, HiSilicon Kirin and Mediatek are the leading players in the processor market.

2.3.2 Identifying New Business Opportunities in Potential Territories

1. Market Survey and Mapping

- Visit the assigned territory and create a map of existing retailers, distributors, and competitors.
- Note areas with high customer footfall (markets, residential clusters, commercial zones) where retailers are missing.
- Identify gaps in product availability compared to competitor brands.

2. Analyzing Customer Demand Trends

- Observe which products are in high demand locally (for example, telecom accessories, recharge coupons, or FMCG items).
- Talk to customers and retailers to understand buying behavior and preferences.

3. Studying Competitors

- Visit competitor outlets to see how they position their products, pricing, promotions, and credit policies.
- Identify weak areas of competitors where you can position your product strongly.

4. Using Data and Reports

- Use sales data, retailer feedback, and seasonal demand patterns.
- Check if there are underserved areas (villages, towns, or new residential colonies) that lack direct supply.

Expanding Retailer Network through Structured Outreach Strategies

1. Planned Retailer Visits

- Prepare a beat plan (fixed route plan) to regularly visit both existing and potential retailers.
- Prioritize areas with no or few retailers dealing in your product category.

2. Retailer Prospecting

- Approach new shops opening in the market (general stores, mobile shops, convenience stores).
- Convince them about the benefits of keeping your product (profit margins, fast-selling, promotional support).

3. Relationship Building

- Offer support services like free product display materials, posters, and signage.
- Provide initial schemes or discounts to new retailers to encourage them to stock your products.

4. Demonstrating Value

- Show how the product has strong customer demand and helps the retailer increase sales.
- Share success stories of nearby retailers who are earning more profit through your products.

5. Structured Follow-up

- Maintain a record of new retailers contacted.
- Revisit and follow up regularly to build trust and ensure they become long-term partners.

6. Community & Local Events

- Use local fairs, markets, and festivals to promote products and onboard new retailers.
- Distribute promotional samples in partnership with new shops.

2.3.3 Principles of Storytelling for Engaging Retailers and Improving Sales

Storytelling helps a Distributor Sales Representative engage retailers and improve sales outcomes by making the pitch more relatable and memorable. The key principles are:

- Keep it simple and relevant to the retailer's daily business.
- Use a problem–solution format to show how the product helps.
- Balance emotion and logic (customer demand + profit margin).
- Share real examples or success stories to build credibility.

For example, a DSR can say: “A nearby shopkeeper faced the same issue of losing customers for affordable earphones. After keeping our product, his sales went up within a week, and now he has repeat buyers.” Such short stories not only highlight product benefits but also build trust and motivate retailers to stock the product.

2.3.4 Methods for Calculating Retailer Return on Investment (ROI)

Return on investment (ROI) is the amount of money a business gets as a return on investment. ROI directly measure the return on a particular investment relative to the investment's cost.

One way to calculate ROI is to divide the net profit (return) by the amount that was invested:

$$\text{ROI (\%)} = \text{net profit} / \text{investment} \times 100$$

Another way to calculate ROI is to take the gains of an investment, subtract the cost of the investment and divide the result by the cost of the investment:

$$\text{ROI} = (\text{gains} - \text{costs}) / \text{costs}$$

What's considered a good ROI depends on the investment. For example, when a company is spending money on a piece of equipment, the ROI is in productivity. Marketing spending, on the other hand, requires an ROI in sales.

Many companies use ROI to identify methods of marketing and advertising that yield the highest return based on previous successes. This way, ROI becomes not only a measure of past success but also an estimate for the coming months.

How to calculate ROI in Retail?

ROI looks at the money you spend to make something happen in your business.

$$\text{ROI} = (\text{how much you earned} / \text{cost of the investment}) / 100$$

For example, if you earned ₹10,000 from an advertising campaign that cost ₹ 2,000: $(₹10,000 / ₹2,000) / 100 = 500\%$

In this case, your ROI would be 500 percent, meaning you earned ₹5 for every ₹1 spent on the advertising campaign, which is pretty good. The higher your ROI, the greater your returns and the more efficient your business is.

2.3.5 Return on Investment (ROI) with Minimal Investment, High Inventory Turnover, and the Benefits of Cross-Selling/Up-selling

A Distributor Sales Representative should explain ROI to retailers in simple terms—how much profit they earn compared to their investment. The key points to highlight are:

- **Minimal Investment:** Retailers don't need to block large funds; even a small stock can start giving returns.
- **High Inventory Turnover:** Fast-selling products ensure quick recovery of investment and steady cash flow.
- **Cross-Selling & Up-Selling:** Suggesting related or higher-value products (e.g., selling earphones with a mobile phone, or a fast charger instead of a basic one) increases average sales per customer.

By showing how small investments can quickly rotate into profits and how add-on sales raise margins, the DSR helps retailers clearly see the financial benefits of stocking the product.

Explaining ROI

“Sir, you do not need to invest heavily to start earning from this product. With just ₹2,000 worth of stock, you can sell it within a week because it has high customer demand. That means your investment comes back quickly, and you can reinvest the same amount again and again – this is called high inventory turnover.

Also, when a customer buys a mobile, you can suggest earphones or a fast charger (cross-selling), or recommend a higher-quality charger with better margins (up-selling). This way, you’re not only selling one product but increasing your total bill value and profit. So, with minimum investment, fast sales, and smart add-on selling, your overall return on investment (ROI) becomes much higher.”

2.3.6 Checking Stock Availability with Retailers and Replenishing

A Distributor Sales Representative must regularly check stock availability with retailers to avoid stock-outs and lost sales. The process is:

- Step 1: Physical Check – During store visits, check shelves and storage to see which products are running low. Ask the retailer about customer demand and fast-moving items.
- Step 2: Use CRM Data – CRM tools show past sales, order frequency, and product movement. This data helps identify which SKUs need replenishment and in what quantity.
- Step 3: Data-Driven Recommendations – Based on trends, suggest the right mix of products (e.g., “Your records show earphones sell out every 10 days, so let’s keep 20 pieces this time to avoid shortage”).
- Step 4: Confirm & Replenish – Share the replenishment plan with the retailer, confirm order size, and arrange timely delivery.

By combining store-level checks with CRM insights, the DSR ensures retailers always have enough stock to meet demand and increase sales without overstocking.

2.3.7 Payment for Stock Replenishment

When collecting payment for stock replenishment, a Distributor Sales Representative should ensure it is efficient, accurate, and secure.

- Plan Ahead: Before visiting, check the retailer’s outstanding dues in the CRM or order records.
- Payment Options: Offer multiple secure methods—cash, cheque, UPI, net banking, or POS machine—depending on retailer preference.
- Verify Transactions: Count cash carefully, confirm cheque details, or check UPI/bank messages instantly.
- Issue Receipt: Always provide a physical or digital receipt to build trust and maintain records.
- Update Records: Enter the payment details immediately in the CRM or sales app to keep accounts transparent and error-free.

By following these steps, the DSR ensures smooth payment collection, better retailer trust, and secure financial transactions.

2.3.8 Common Retailer Complaints and their Resolutions

Retailers are key business partners, and their concerns must be handled with care. A Distributor Sales Representative (DSR) should be prepared for common complaints such as:

- **Delayed Deliveries:** Late supply leads to lost sales.
- **Resolution:** Track orders through CRM, ensure timely delivery, and keep the retailer informed.
- **Low Profit Margins:** Retailers may feel their earnings are less compared to competitors.
- **Resolution:** Highlight fast-moving products, seasonal schemes, or bundling options that increase profit.
- **Product Quality Issues:** Defective or damaged stock reduces trust.
- **Resolution:** Replace faulty stock quickly, assure quality checks, and provide feedback to the distributor.
- **Lack of Promotions or Support:** Retailers often want help in attracting customers.
- **Resolution:** Provide display material, posters, and suggest cross-selling techniques to boost visibility.

By resolving complaints quickly, fairly, and transparently, a DSR strengthens trust and encourages retailers to continue stocking products.

2.3.9 Negotiation Strategies for Mutually Beneficial Outcomes

Negotiation is about creating a win-win situation where both the distributor and the retailer benefit. Effective strategies include:

- **Listen Actively:** Understand the retailer's actual concerns before responding.
- **Use Data & Facts:** Show sales history, demand trends, and turnover data to support your point.
- **Offer Flexible Solutions:** If higher margins are not possible, offer faster turnover products, easy credit terms, or promotional schemes.
- **Build Long-Term Value:** Emphasize partnership benefits—consistent supply, steady profits, and customer satisfaction.
- **Stay Professional:** Remain calm, respectful, and solution-oriented even if the retailer is upset.

Through effective negotiation, the DSR ensures retailer satisfaction, distributor growth, and stronger long-term relationships.

2.3.10 Enhancing Brand Visibility through Effective Merchandising

Merchandising and its Importance

Retailers use merchandising techniques to influence customer intent to buy their products. Merchandising is the exercise and process of displaying and selling products to customers. It can be either digital or in-store.

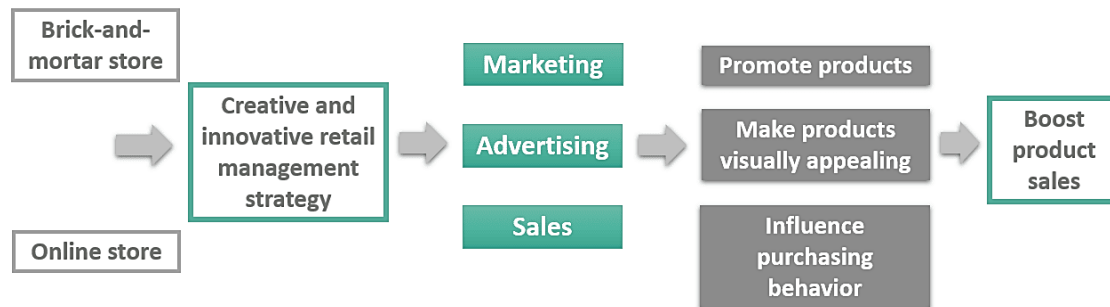


Fig. 2.3.1: Merchandising

Merchandising is an activity done at the point of sale, high customer traffic areas within the stores, outside the stores and on the display shelves to stimulate purchase by informing the customer about the product to increase sales and maximize profits. It is used to put products and promotional materials together to market items to customers.

It uses various techniques to convince retailers to stock their products and display their merchandise in prominent and highly visible spots within their stores. The item is being sold to the target audience or the buyers interested in buying the product and its services. This practice helps deliver the correct product to the correct person and at the correct time.

Merchandising needs lots of planning. It is not only limited to arranging items on the store shelves. A high volume of stocks within the retail store may lead to wastage and higher investment, leading to losses. On the other hand, lesser inventory will lead to losing customers to competitors, and this will again affect the business of the distributor as well as the retailer. To avoid such situations, distributors must have good market intelligence and information on the demand and consumption of products. This will help them in stocking the right products at the right time in the right quantity at the retailer's store. This further helps build a good relationship with retailers by enhancing their sales.

All the elements of merchandising contribute to making a store more organized. The critical merchandising elements include:

- Salesfloor layout
- Interior Signage
- Cross merchandising
- Use of space, colour, lighting
- Mass displays
- Interactive technology

Concept of Planogram

A planogram is a diagrammatic representation of the products' placement, position, and quantity. Usually, it is in a storytelling mode, where the entire store is laid out diagrammatically and culminates in category and sub category.



Fig. 2.3.2 Planogram of a mobile retail outlet

2.3.11 Using Social Media Tools for Retail Promotions and Social Selling in Telecom

For a Distributor Sales Representative in Telecom Products and Accessories, social media can be a cost-effective and powerful medium to increase product visibility, attract retailers, and push sales. Some best practices include:

- **Promote New Launches and Offers:** Share updates about new telecom products (SIM cards, recharge packs, mobile accessories) and special retailer schemes through WhatsApp groups, Facebook pages, or Instagram stories to ensure quick awareness among retailers.
- **Use WhatsApp for Retailer Engagement:** Retailer groups to share daily price lists, promotional videos, scheme alerts, and product images. This helps retailers stay updated and motivates them to push sales.
- **Leverage Short Videos and Demos:** Use short demo videos on how to use or display telecom accessories (e.g., chargers, earphones, power banks) and circulate them on social platforms. Visual demonstrations often convince retailers and end customers faster.
- **Encourage Retailers to Share Posts:** Provide ready-to-use product posters, images, and festival offers that retailers can post on their own pages. This expands the brand's visibility to local buyers.
- **Social Selling through Direct Interaction:** Use social media to directly answer retailer queries, share success stories, and even collect small orders. Live sessions can be held to explain ongoing telecom schemes.
- **Maintain Consistency:** Always use the same brand logos, product images, and tone while posting. This helps in maintaining strong brand identity across retailer networks.
- **Track Engagement:** Observe which posts generate the most retailer response (e.g., offers, product demos) and use these insights to improve future campaigns.

A DSR can guide retailers to use digital platforms for better customer engagement and sales.

- **Create Online Presence:** Help set up WhatsApp Business or Facebook pages with store details.
- **Share Content:** Provide product images, videos, and offer posters for regular posting.
- **Promote Schemes:** Teach retailers to announce discounts, recharge packs, and festival offers online.
- **Engage Customers:** Encourage quick replies, use of WhatsApp Status, and sharing daily deals.
- **Use Tools:** Show how to share product catalogs on WhatsApp and post on Facebook Marketplace.

Computing MTD Sales to Guide Retailers

A Distributor Sales Representative can use Month-to-Date (MTD) sales performance to show retailers how they are progressing and motivate them to purchase more.

Steps to Demonstrate MTD Sales:

- **Collect Data:** Note the total purchases made by a retailer from the 1st of the month till today.
- **Compare with Target:** Check the retailer's sales against their monthly target or past month's sales.
- **Example:** Target = 100 units, MTD sales till 15th = 40 units.
- **Performance** = 40% achieved, 60% pending.
- **Highlight Gap:** Explain how many more units need to be bought to reach the target.
- **Motivate with Benefits:** Show retailers how achieving targets can give them benefits like higher margins, incentives, or eligibility for schemes.
- **Suggest Action Plan:** Recommend stocking fast-moving telecom products (SIM cards, recharge packs, chargers, earphones) to close the gap quickly.

Outcome:

Retailers understand their progress, identify sales gaps, and are motivated to increase their purchase volume for higher profits and rewards.

Exercise

Multiple Choice Questions:

- Which of the following is a probing technique used to identify retailer needs?
 - Asking open-ended questions
 - Ignoring retailer feedback
 - Only checking competitor products
 - Avoiding customer interaction
- The main role of CRM systems in sales is to:
 - Increase stock carrying costs
 - Automate planning, scheduling, and generate insights
 - Replace retailer relationships completely
 - Only keep invoices
- The FAB (Feature–Advantage–Benefit) approach helps a sales representative to:
 - Discuss only the product features
 - Highlight value by linking product features to customer benefits
 - Focus only on competitor pricing
 - Avoid explaining promotions
- Which storytelling principle helps improve retailer engagement?
 - Using irrelevant personal stories
 - Connecting product value to retailer/customer needs
 - Avoiding examples and narratives
 - Speaking in technical jargon only
- Route and beat plans are important for sales representatives because they:
 - Ensure random retailer visits
 - Guarantee efficient coverage and time-saving
 - Eliminate the need for CRM tools
 - Focus only on big retailers

Short Questions:

- Why is it important to use CRM tools to identify retailer needs and sales trends?
- How does ROI (Return on Investment) help retailers make better decisions?
- Mention any two ways in which social media tools can support retail promotions and social selling.

Fill in the Blanks:

- _____ questions are effective for probing and identifying retailer needs.
- The FAB approach stands for Feature, _____, and Benefit.
- _____ techniques like line selling and range selling help increase retailer basket size.
- _____ sales performance helps monitor retailer purchases within a specific month.

True or False:

- CRM tools can be used to automate task scheduling and track sales targets. ☐
- Storytelling in sales should avoid connecting with retailer challenges. ☐
- Effective negotiation strategies help achieve mutually beneficial outcomes. ☐
- Cross-selling and up-selling can improve ROI by increasing turnover on minimal investment. ☐

Notes



Lined area for taking notes, consisting of multiple horizontal lines.



3. Personal Skill Development for Sales Success



Unit 3.1 - Training Tools, Communication Skills, and Sales Effectiveness



Key Learning Outcomes



By the end of this module, the participants will be able to:

1. Explain the features and advantages of app-based and automated training platforms for educating retailers and sales staff.
2. Elucidate the features and benefits of automated training tools, including their flexibility, ease of use, and impact on sales performance.
3. Describe the role of automation in streamlining tasks, generating reports, managing time efficiently, and boosting customer interactions.
4. Demonstrate how to use automated product training tools to enhance learning flexibility, improve product knowledge, and increase sales turnover.
5. Discuss the importance of continuous learning for improving sales performance.
6. Demonstrate how to improve personal skills in sales, customer service, and teamwork through relevant training sessions.
7. Explain the role of non-verbal communication, such as body language, in enhancing retailer engagement and customer interactions.
8. Show how to use eye contact, appropriate body language, and facial expressions to make communication clear and professional.
9. Determine the basics of commercial accounting and the payment collection and claim settlement process, including strategies for ensuring timely and accurate transactions.
10. Show how to follow basic negotiation techniques to handle retailer concerns and finalize orders smoothly.

UNIT 3.1: Training Tools, Communication Skills, and Sales Effectiveness

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the features and advantages of app-based and automated training platforms for educating retailers and sales staff.
2. Elucidate the features and benefits of automated training tools, including their flexibility, ease of use, and impact on sales performance.
3. Describe the role of automation in streamlining tasks, generating reports, managing time efficiently, and boosting customer interactions.
4. Demonstrate how to use automated product training tools to enhance learning flexibility, improve product knowledge, and increase sales turnover.
5. Discuss the importance of continuous learning for improving sales performance.
6. Demonstrate how to improve personal skills in sales, customer service, and teamwork through relevant training sessions.
7. Explain the role of non-verbal communication, such as body language, in enhancing retailer engagement and customer interactions.
8. Show how to use eye contact, appropriate body language, and facial expressions to make communication clear and professional.
9. Determine the basics of commercial accounting and the payment collection and claim settlement process, including strategies for ensuring timely and accurate transactions.
10. Demonstrate how to use basic social media tools to connect with retailers and share product information effectively.
11. Show how to follow basic negotiation techniques to handle retailer concerns and finalize orders smoothly.

3.1.1 App-Based and Automated Training Platforms

App-based and automated training platforms make it easier to train retailers and sales staff anytime, anywhere. These platforms provide short, engaging modules and track progress automatically, ensuring quick learning and consistent knowledge.

Key Features & Advantages

- Accessible on mobile devices anytime
- Short video-based or quiz modules
- Automatic updates for new products/offers
- Tracks completion and performance
- Saves time, cost, and ensures consistency



Fig. 3.1.1 Using LMS for training

3.1.2 Features and Benefits of Automated Training Tools

Automated training tools are digital platforms designed to deliver learning content efficiently to sales teams and retailers. They use technology to simplify training, track progress, and ensure consistency.

Key Features

- **Flexibility** – Anytime, anywhere access via mobile or web, allowing learners to train at their convenience.
- **Ease of Use** – User-friendly interfaces, simple navigation, and modular content make learning engaging and less time-consuming.
- **Interactive Content** – Videos, quizzes, and simulations keep learners active and motivated.
- **Progress Tracking** – Automated dashboards show completion rates, performance, and areas of improvement.
- **Scalability** – One system can train hundreds or thousands of people simultaneously, ensuring uniform knowledge.

Benefits

- **Improved Sales Performance** – Sales teams stay updated on product features, promotional schemes, and customer engagement techniques, directly boosting conversions.
- **Cost and Time Efficiency** – Reduces dependency on physical trainers, saves travel/training costs, and shortens learning cycles.
- **Consistency in Training** – Every learner gets the same standardized content, reducing errors in sales execution.
- **Better Engagement and Retention** – Bite-sized, gamified learning improves knowledge retention and application on the job.
- **Real-Time Updates** – Content can be updated instantly to match market or product changes.

3.1.3 Role of Automation in Business Operations

Automation leverages technology to handle repetitive, data-driven, and time-sensitive activities. It enhances efficiency, reduces errors, and allows sales teams to focus more on customer engagement and business growth.

1. Streamlining Tasks

- Automates routine activities such as order processing, inventory updates, and payment reminders.
- Reduces manual effort and eliminates duplication of work.
- Ensures accuracy and faster task completion.

2. Generating Reports

- Provides real-time dashboards and automated report generation on sales, stock levels, and customer data.
- Saves time otherwise spent on manual data entry and analysis.
- Helps managers take informed decisions with up-to-date insights.

3. Managing Time Efficiently

- Automates scheduling, reminders, and follow-ups with retailers.
- Allows field teams to plan visits and sales routes more effectively.
- Frees up time for high-value activities like negotiation and relationship building.

4. Boosting Customer Interactions

- Sends personalized messages, offers, and updates automatically.
- Ensures timely communication, increasing trust and loyalty.
- Improves responsiveness by reducing delays in addressing queries or complaints.

3.1.4 Importance of Continuous Learning for Improving Sales Performance

As a Distributor Sales Representative in the telecom sector, your role is not only to sell products but also to guide retailers, answer customer queries, and adapt to market needs. Continuous learning helps you improve these skills and achieve better results in sales.

Why Continuous Learning is Important

1. Keeps You Updated on Telecom Products

- New mobile accessories, SIM offers, and recharge schemes are launched regularly.
- Learning continuously ensures you can explain these updates clearly to retailers and customers.

2. Improves Selling Skills

- By learning better communication, negotiation, and presentation techniques, you can convince retailers to stock more products.
- This leads to higher sales and stronger business relationships.

3. Helps in Handling Challenges

- Continuous learning trains you to deal with retailer complaints, stock issues, or competition in a professional way.
- You become more confident in solving problems.

4. Adapts to Market and Technology Changes

- Telecom is a fast-changing industry. New apps, payment systems, and digital tools are being introduced.
- Learning ensures you stay ahead and guide retailers on how to use these tools.

5. Boosts Sales Performance

- Updated knowledge builds trust with retailers.
- The more you learn, the better you perform, which increases your incentives and growth opportunities.

3.1.5 Improving Personal Skills through Training

A Distributor Sales Representative must regularly improve skills in sales, customer service, and teamwork. Training sessions provide practical knowledge and techniques to perform better on the job.

1. Sales Skills

- **Training Focus:** Product knowledge, communication techniques, and negotiation.
- **How it Helps:**
 - Explains telecom products and schemes clearly to retailers.
 - Builds confidence to close sales and increase order volumes.
- **Example Activity:** Role-play a sales pitch for a new mobile accessory.

2. Customer Service Skills

- **Training Focus:** Handling complaints, active listening, and problem-solving.
- **How it Helps:**
 - Improves trust and satisfaction among retailers.
 - Ensures repeat orders and long-term business relationships.
- **Example Activity:** Practice responding to a retailer who is unhappy with delayed stock delivery.

3. Teamwork Skills

- **Training Focus:** Cooperation, coordination, and clear communication with colleagues.
- **How it Helps:**
 - Creates smooth operations between sales, logistics, and accounts teams.
 - Encourages knowledge sharing and faster problem resolution.
- **Example Activity:** Group task to plan a route for covering maximum retailers in one day.

3.1.6 Explain the Role of Non-verbal Communication, Such as Body Language, in Enhancing Retailer Engagement and Customer Interactions

Non –Verbal Communication

Non-verbal communication includes the overall body language of a person. There are two kinds of non-verbal communication:

1. Signs and symbols: for example pictures, or notices, or signboards, or even photographs, sketches and paintings. Here are some examples of different signs and symbols:



Fig. 3.1.2 Symbols uses to depict non verbal cues

2. Gestures and expressions:

Hand signs, facial expressions, body postures or body language that can help to convey a message. You can learn to communicate better with others if you learn to recognise some of these.

- Facial expressions - A smile or a frown
- Gestures - movements of hands and body to help explain or emphasize the verbal message
- Body posture - how we stand or sit. Maintain a good posture.

When you are talking to a colleague or guest, remember to stand up straight, look professional and be positive. Do not slouch, lean against something or fidget with equipment or your hands.

- Orientation - whether we face the other person or turn away
- Eye contact - whether we look at the other person and for how long
- Proximity - the distance we are from a person
- Head nods - for encouragement, indication of agreement or disagreement
- Appearance - dress and grooming
- Non-verbal aspects of speech - tone and pitch of voice

3.1.7 Using Eye Contact, Body Language, and Facial Expressions for Professional Communication

As a Distributor Sales Representative, your communication style directly affects how retailers and customers trust you. Along with words, eye contact, body language, and facial expressions play a major role in making your message clear and professional.

1. Eye Contact

- Look at the retailer's eyes when speaking or listening.
- Shows confidence, honesty, and attentiveness.
- Avoid staring continuously – instead, maintain natural and friendly eye contact.
- Example: When explaining a new recharge plan, look at the retailer for a few seconds to show you are confident about the offer.

2. Appropriate Body Language

- Stand or sit straight with relaxed shoulders – shows confidence.
- Use open hand gestures when explaining, instead of crossing arms.
- Slightly lean forward when listening – shows interest and respect.
- Avoid fidgeting, checking your phone, or turning away.

3. Facial Expressions

- Smile naturally when greeting or closing a discussion – creates a positive impression.
- Use expressions that match your words (don't smile when discussing a complaint).
- Keep a calm and pleasant face even when the customer is upset – it helps control the situation.

Why It Matters

- Builds trust and confidence with retailers.
- Makes your communication clear and professional.
- Improves chances of convincing retailers to stock or promote telecom products.

3.1.8 Commercial Accounting and Payment Collection

A transaction is the "give & take" that happens in any business activity involving the transfer of money, goods, or services. It is important to record these transactions methodically and precisely to understand the business relationship between individuals.

Book-keeping is the initial phase of accounting, which involves keeping a written track of all financial dealings.

Accounting is a more advanced stage that studies and clarifies these financial records, preparing monetary or commercial records of all transactions.

Key Terms:

- **Assets:** Anything valuable to an organization, such as money, goods, infrastructure, or land.
- **Equity:** The value of a company's share, broadly classified into two parts: owner claim (capital) and outsider's claim (liability). Capital is the difference between a company's assets and liabilities.
- A liability is anything an enterprise owes, like a loan.
- **Revenue:** The financial value of products and services sold to customers over a specific period.
- **Expense/Cost:** The monetary amount spent to earn revenue.
- **Invoice:** A bill for a product sold or service given, detailing items, transaction date, delivery, and total cost, including taxes and discounts.
- **Pro forma Invoice:** An agreement where a vendor commits to delivering a product or service to a purchaser; it's not a factual invoice.
- **Balance Sheet:** A representation of a company's financial status at a given time, with assets on the right side and liabilities on the left side.

Banking Records:

Some common terms and tools for banking transactions include:

- **Cheque Books:** A common way to pay. The leaflet at the end of a cheque book should be filled out to record cash flow, including the payment date, payee's name, particulars of purchased items, and the total amount.
- **Bank Deposits:** A receipt from the bank, usually stamped and signed by the counter officer. It's important to keep these for reconciliation.
- **Bank Statements:** A record of each transaction provided by the bank. Comparing a bank statement to a cash book is called bank reconciliation.
- **Cash Book:** A rudimentary bookkeeping system that records all cash transactions, helps monitor cash flow, and can be used to verify bank statements and prepare tax returns.

Collection:

In business, it's crucial to handle collections promptly without damaging relationships. Key principles to consider are:

- **Collect the money:** The primary job of a collector is to collect money. The tone should start indulgently but can be intensified as needed to ensure the debtor meets their payment obligation.
- **Maintain an orderly (systematic) follow-up:** Follow up on the next scheduled date after the first contact with a defaulter. A systematic follow-up shows the seriousness of the situation to the debtor.
- **Get the customer to discuss the account:** A collector should try to get the defaulter to talk and explain their reason for the delay, whether it's a temporary fund shortage, a dispute, or a short-term investment. Based on this, an exception can be made, but it must be made clear that the situation shouldn't be repeated.
- **Preserve Goodwill:** It is important to preserve goodwill during collections because a defaulter today could become a valuable customer in the future.

Points to be considered during collection

When collecting payments, a few important points should be considered:

- **Amount Owed:** Focus on collecting larger debts over smaller ones, but be careful not to write off small balances or waste time and money on inflexible and indiscreet efforts. Knowing when to terminate a collection effort is crucial to control costs, and outsourcing can be a good option.
- **How long has the item been unpaid:** Have a bracket system for the age of collections. If an account has reached the last stage, it's less likely the customer will pay, so evaluate if the collection amount is still worth the time and effort.
- **The pattern of payment:** Check if the debtor has made any efforts to pay, such as partial payments.
- **Customer relationship:** For new customers, make sure they understand the payment policy. For old customers, check their payment history to see if previous defaults were cleared or if the issue is with a specific product or service.
- **Previous dealings:** Review past interactions to see if the customer has stood by their pledges.
- **Internal issues:** Before a collector contacts a customer, ensure that internal problems are addressed, such as unapplied checks, billing disputes, unused credits from returns, or verbal commitments from sales representatives.

3.1.9 Negotiation Techniques to Handle Retailer Concerns and Finalize Orders

Effective negotiation with retailers involves being prepared, addressing their concerns, and working toward a mutual agreement to finalize an order. Here's a breakdown of the key steps:

1. Preparation and Pre-planning

- **Know your products:** You must be fully aware of all existing (old and latest) and upcoming phone models and their features. This is crucial because a lack of awareness reflects poorly on the company and can create a negative impression.
- **Stay updated on offers:** Be aware of all the latest schemes and offers from distributors.
- **Carry the necessary materials:** Always have the latest company brochure or leaflet with information on all existing phones and offers.

2. Understanding the Retailer's Perspective

- **Listen actively:** Use active listening skills to understand the retailer's wants and needs. This is the primary skill a distributor should have.
- **Get the retailer to talk:** Encourage them to discuss any concerns they have, such as fund shortages, product disputes, or other business investments.
- **Ask questions:** Use open-ended and probing questions to clarify their position and show you are attentive.

3. Handling Concerns and Objections

- Be diplomatic and respectful: Remain composed and professional, regardless of a stressful situation.
- Address issues transparently: If a retailer has an unpaid account, for example, get them to explain the reason for the default. You can then work with them to find a solution, while making it clear that the situation should not be repeated.
- Preserve goodwill: A defaulter today could become a valuable customer tomorrow, so always try to maintain a good relationship.

4. Finalizing the Order and Following Up

- Summarize and paraphrase: To ensure you've understood the retailer's concerns and requests, summarize their points and paraphrase them back to them.
- Confirm all details: Once a mutual agreement is reached, ensure all terms are clear. An invoice, for example, details the items, transaction date, and total cost. A pro forma invoice is a commitment by the vendor to deliver a product.
- Maintain a systematic follow-up: After the order is placed, follow up to ensure delivery and customer satisfaction. A systematic follow-up emphasizes the seriousness of the situation and the importance of meeting obligations.

Exercise

Short Question:

1. Mention two advantages of using app-based training platforms for sales staff.
2. Explain one way automation helps improve customer interactions.
3. Why is non-verbal communication (like posture and facial expressions) important in retailer engagement?

Fill in the Blanks:

1. _____ are digital platforms that deliver learning content efficiently to sales teams.
2. A _____ invoice is an agreement where a vendor commits to deliver a product to a purchaser.
3. The _____ approach helps sales representatives explain product value using features, advantages, and benefits.

True / False:

1. App-based training platforms can only be accessed during working hours. ☐
2. Automation helps in reducing manual errors and saving time in routine sales tasks. ☐
3. Non-verbal communication like posture, gestures, and facial expressions has no impact on retailer engagement. ☐
4. A pro forma invoice is a confirmed bill of sale that records payment.
5. Continuous learning keeps Distributor Sales Representatives updated with new telecom products and schemes. ☐

Match the Following:

Column A	Column B
1. FAB Approach	a. Displays company's financial status at a given time
2. Balance Sheet	b. Tracks completion and performance of learners
3. Automation	c. Explains product's Feature, Advantage, and Benefit
4. Progress Tracking	d. Saves time by streamlining tasks and generating reports
5. Eye Contact	e. Shows attentiveness and builds trust in communication

Notes



Lined area for taking notes, consisting of multiple horizontal lines.



4. Pre-Planning for Efficient Product Distribution



Unit 4.1 - Sales Strategies, Retailer Engagement, and Automation Tools

Unit 4.2 - Merchandising, AI Tools, Professional Conduct, and Sales Planning



Key Learning Outcomes

By the end of this module, the participants will be able to:

1. Explain the use of market trends and competitor analysis in refining sales strategies.
2. Show how to analyze sales strategies, market trends, and competitor offers to stay updated.
3. Describe the functionality of automated route planning and inventory tools for optimizing distribution processes.
4. Show how to utilize automated software for route planning and resource allocation to optimize the delivery schedule.
5. Discuss techniques for cross-selling, upselling, and segmenting customers effectively.
6. Show how to plan cross-selling and upselling strategies based on CRM insights and market analysis.
7. Determine the key performance indicators (KPIs) used to track retailer performance and sales growth.
8. Demonstrate how to use CRM-generated reports to analyze sales data and identify high-priority retailers for targeted engagement.
9. Elucidate the strategies for building a robust retailer network and onboarding new retailers.
10. Demonstrate how to identify existing retailers and analyze their current and future demands to recommend suitable products.
11. Demonstrate how to inform retailers about the company's product portfolio and enroll them for new variants/products to expand distribution coverage.
12. Show how to use automated tools to track and manage leads, ensuring timely follow-up and retailer onboarding.
13. Describe the impact of visual merchandising on customer attraction and product sales.
14. Demonstrate how to guide retailers in using merchandising tools effectively to maximize store visibility and customer engagement.
15. Discuss the benefits of AI tools in demand forecasting and inventory planning.
16. Show how to plan to cover the maximum retailer base within the territory using AI-based tools for demand forecasting and inventory planning.
17. Elucidate the importance of adhering to personal grooming and professional behavior standards.
18. Show how to maintain personal grooming and hygiene standards to create a professional impression.
19. Explain the role of social selling and digital marketing tools in modern sales processes.
20. Demonstrate how to determine daily, monthly, and quarterly sales targets by coordinating with the Territory Sales Manager (TSM) or Area Manager.
21. Demonstrate how to create a detailed plan by splitting monthly/quarterly targets into weekly and daily milestones.
22. Demonstrate how to collect and verify stock and merchandising materials from the manufacturer/distributor, ensuring no defective or damaged products are distributed.
23. Show how to use intelligent negotiation tactics to improve profitability and strengthen partnerships.

UNIT 4.1: Sales Strategies, Retailer Engagement, and Automation Tools

Unit Objectives

By the end of this unit, the participants will be able to:

1. Explain the use of market trends and competitor analysis in refining sales strategies.
2. Show how to analyze sales strategies, market trends, and competitor offers to stay updated.
3. Describe the functionality of automated route planning and inventory tools for optimizing distribution processes.
4. Show how to utilize automated software for route planning and resource allocation to optimize the delivery schedule.
5. Discuss techniques for cross-selling, upselling, and segmenting customers effectively.
6. Show how to plan cross-selling and upselling strategies based on CRM insights and market analysis.
7. Determine the key performance indicators (KPIs) used to track retailer performance and sales growth.
8. Demonstrate how to use CRM-generated reports to analyze sales data and identify high-priority retailers for targeted engagement.
9. Elucidate the strategies for building a robust retailer network and onboarding new retailers.
10. Demonstrate how to identify existing retailers and analyze their current and future demands to recommend suitable products.
11. Demonstrate how to inform retailers about the company's product portfolio and enroll them for new variants/products to expand distribution coverage.
12. Show how to use automated tools to track and manage leads, ensuring timely follow-up and retailer onboarding.

4.1.1 Understanding Market Trends and Competitor Analysis in Sales

1. Why Market Trends Matter

Market trends are the overall directions in which customer preferences, technology, and demand are moving.

For a Distributor Sales Representative (DSR) in Telecom Products, staying aware of market trends helps in:

- Identifying which telecom products (like mobile accessories, SIM cards, data packs, broadband devices) are in high demand.



Fig 4.1.1: Foldable screen

- Understanding seasonal changes (e.g., more demand for data packs during festivals or exam season).
- Spotting new customer preferences (like shift towards faster internet plans, smart accessories).

Example: If the trend shows increasing demand for wireless earphones, the DSR can promote and push sales of these products more actively to retailers.

2. Role of Competitor Analysis

Competitor analysis means studying what other distributors or brands are offering. This helps in refining your own sales strategies by:

- Knowing competitor pricing and offers (discounts, schemes, free gifts).
- Learning about competitor's strong products and weak areas.
- Comparing distribution network and service levels.
- Identifying gaps in competitor's strategy where you can capture customers.

Example: If a competitor is offering higher discounts on mobile chargers, you may focus on selling your product's better quality and warranty as a stronger point.

3. How It Refines Sales Strategies

By combining market trend awareness and competitor analysis, the DSR can:

- Suggest the right products to retailers that match current demand.
- Plan promotions and offers to compete effectively.
- Improve product visibility in retail stores.
- Support retailers with information that builds customer trust.

Simple Case:

- Market Trend: Customers want faster-charging cables.
- Competitor: Selling low-cost but poor-quality cables.
- Strategy: Highlight your brand's safe and durable fast-charging cables, even at a slightly higher price.

4. Practical Application for Leaners

As a DSR, you should:

- Regularly talk to retailers about customer demand.
- Visit competitor's product displays and note their offers.
- Keep track of new telecom launches and schemes.
- Adjust your sales pitch to highlight your product's advantages over competitors.

4.1.2 Analyzing Sales Strategies, Market Trends, and Competitor Offers

1. Why Analysis is Important

As a Distributor Sales Representative (DSR), your role is not only to sell but also to stay updated about the market. Analyzing sales strategies, market trends, and competitor offers helps you:

- Know what is working well in your sales.
- Understand what customers currently prefer.
- Compare your products with competitors and plan improvements.

2. Steps to Analyze Sales Strategies

Sales strategy means the method you use to sell products to retailers. To analyze it:

- Review past sales – Check which telecom products sold the most and which sold less.
- Collect retailer feedback – Ask retailers about product demand, customer satisfaction, and challenges.
- Measure success of schemes/offers – See if discounts or bundled offers increased sales.
- Check repeat orders – High repeat sales means your strategy is effective.

Example: If your strategy of giving free demo units increased SIM card activations, note it as a successful method.

3. How to Analyze Market Trends

Market trends show what customers are buying more or less of. To analyze them:

- Observe customer buying behavior from retailer feedback (e.g., more demand for high-speed data packs).
- Track seasonal demand (e.g., higher phone accessory sales during festivals or back-to-school season).
- Stay informed by reading telecom updates, advertisements, and brand launches.

Example: Rising demand for 5G-ready smartphones means customers will also buy 5G SIM cards and compatible accessories.

4. How to Analyze Competitor Offers

Competitors may give strong discounts, freebies, or schemes. To analyze them:

- Visit stores – Check how competitors display their products and offers.
- Note their pricing – Compare with your product prices.
- Observe promotions – Identify if they provide combo offers, warranty, or credit facilities.
- Check customer preference – Ask retailers if customers prefer competitor's products and why.

Example: If a competitor is offering "Buy 2 chargers, get 1 free," you can promote your product's longer life and safety features to balance the offer.

5. Staying Updated

To keep yourself current in the telecom market:

- Maintain a sales diary of trends and competitor schemes.
- Discuss with your sales manager about best practices.
- Share information with fellow DSRs to learn from each other.
- Regularly revise your sales pitch to include updated offers and product features.

4.1.3 Functionality of Automated Route Planning and Inventory Tools

1. Why Distribution Optimization is Important

For a Distributor Sales Representative (DSR), time and stock are the two most valuable resources.

- If routes are not planned properly → you may waste time, fuel, and miss important retailers.
- If inventory is not tracked properly → retailers may face stockouts, leading to lost sales opportunities.

Automated tools help solve these problems by saving time, reducing errors, and improving efficiency.

2. Functionality of Automated Route Planning Tools

Automated route planning software/apps help a DSR plan and follow the best delivery routes.

Main Functions:

- Optimized Travel Path – Suggests shortest or fastest route to cover maximum retailers in less time.
- 2. Beat Plan Scheduling – Helps plan daily/weekly visits (which retailer to visit on which day).
- 3. GPS Integration – Guides you with live maps and traffic updates.
- 4. Visit Tracking – Records which shops were visited and which were pending.
- Performance Reports – Provides data on time taken, coverage, and missed outlets.

Example: Instead of manually deciding where to go, the app gives you a planned route:

“Visit Shop A → Shop B → Shop C,”

saving travel time and ensuring all priority retailers are covered.

3. Functionality of Automated Inventory Tools

Automated inventory management systems help track and manage stock levels.

Main Functions:

- **Real-Time Stock Updates** – Shows available quantity of telecom products (SIM cards, chargers, cables, earphones, etc.).
- **Demand Forecasting** – Predicts which products will be required soon based on past sales.
- **Low-Stock Alerts** – Sends notifications when stock is running low.
- **Order Processing** – Automatically generates order lists for replenishment.
- **Warehouse to Retailer Mapping** – Tracks which stock is sent to which retailer.

Example: If retailers are buying more data packs during exam season, the system alerts you to stock more recharge vouchers in advance.

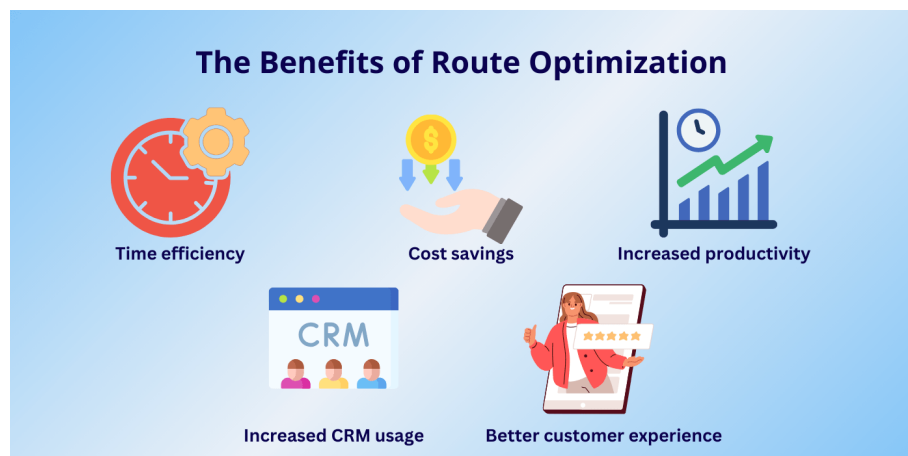


Fig. 4.1.2 Benefits of Route optimization

4. Benefits for Distribution Processes

Using automated tools helps the DSR in:

- Saving Time & Cost – Less travel and reduced fuel expenses.
- Avoiding Stockouts – Ensures products are always available at retail outlets.
- Better Retailer Satisfaction – Timely delivery and correct order quantities.
- Accurate Reporting – Easy to share data with managers.
- Higher Sales – Because distribution becomes smooth and efficient.

4.1.4 Utilizing Automated Software for Route Planning and Resource Allocation

In telecom product distribution, timely delivery and efficient use of resources are crucial for success. A Distributor Sales Representative (DSR) often needs to cover multiple retailers in a single day, and any delay or mismanagement can lead to missed sales opportunities or dissatisfied retailers. Automated software for route planning and resource allocation helps simplify this process by suggesting the best delivery routes, assigning the right resources, and optimizing the overall delivery schedule. This ensures that time, fuel, and manpower are used effectively while meeting retailer needs on time.

1. Steps to Use Automated Route Planning Software

- Enter Retailer Details – Add retailer names, addresses, and visit frequency into the app/software.
- Set Priorities – Mark important outlets (e.g., high-volume retailers or urgent orders).
- Generate Route – The software automatically creates the shortest and most cost-effective route.
- Follow GPS Guidance – Use the live navigation feature to reach each retailer in sequence.
- Track Visits – Mark visited shops in the app, ensuring no retailer is missed.

Example: Instead of manually planning to visit 10 shops, the app may suggest:

Shop 3 → Shop 5 → Shop 7 → Shop 1 → Shop 10, saving both time and fuel.

2. Using Software for Resource Allocation

- Resource allocation means assigning the right resources for the right task. Automated software helps in:
- Vehicle Allocation – Assigning delivery vehicles based on load and route.
- Manpower Planning – Assigning delivery staff or helpers to specific routes.
- Stock Allocation – Ensuring correct stock is loaded for each route.
- Time Allocation – Scheduling deliveries at the best time (avoiding rush hours or retailer closure).

Example: If one route covers 15 shops and another only 6, the system can allocate a bigger vehicle and two helpers for the first route, and a smaller vehicle for the second.

3. Optimizing the Delivery Schedule

- By combining route planning and resource allocation:
- Deliveries become faster and more organized.
- Retailers get products on time, reducing complaints.
- Wastage of fuel, manpower, and time is reduced.
- DSR can cover more outlets in a single day, boosting sales.

4.1.5 Techniques for Cross-Selling, Upselling, and Customer Segmentation

As a Distributor Sales Representative (DSR) in telecom products, it is not enough to only deliver products. To increase sales and improve retailer satisfaction, you must learn how to cross-sell, upsell, and segment customers. These techniques help you understand customer needs better and offer the right products in the right way, leading to higher sales and stronger business relationships.

1. Cross-Selling Techniques

Cross-selling means offering related or complementary products along with the main purchase.



Fig. 4.1.3 Cross selling techniques

How to do it effectively:

- Understand retailer/customer needs – If a retailer orders SIM cards, suggest recharge vouchers or internet packs.
- Bundle products – Offer earphones with mobile phones, or chargers with cables.
- Highlight benefits – Show how the extra product increases convenience or profit for the retailer.
- Give schemes – Small discounts or combo packs encourage retailers to buy related products.

Example: If a retailer buys mobile chargers, suggest selling phone stands or USB cables as add-ons.

2. Upselling Techniques

Upselling means persuading the retailer or customer to buy a higher-value or premium product.

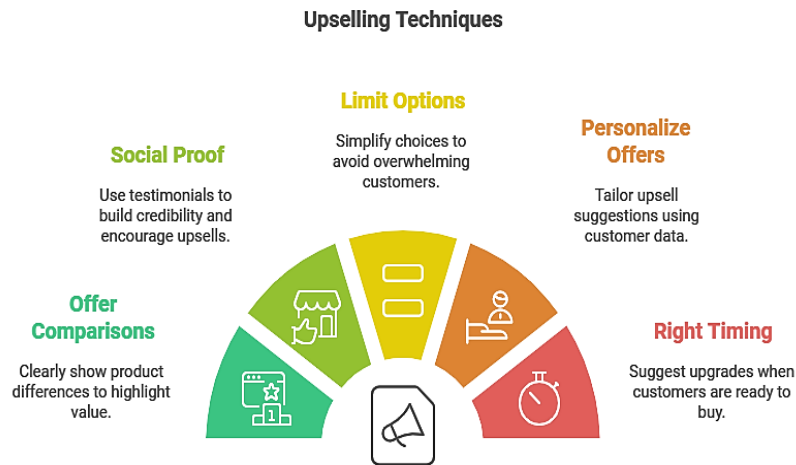


Fig 4.1.4 Upselling techniques

How to do it effectively:

- Show product advantages – Highlight longer warranty, faster performance, or better quality.
- Use comparisons – Explain why the premium product gives more value in the long run.
- Offer trial/demo – Let retailers experience the better product (like a fast-charging cable).
- Emphasize profit margins – Show retailers how premium products can give them higher earnings.

Example: If a retailer is buying a basic 10W charger, suggest upgrading to a 20W fast charger with better safety features.

3. Customer Segmentation Techniques

Customer segmentation means dividing retailers/customers into groups based on their buying behavior, size, and needs. This helps in targeting them with the right sales strategy.

Ways to segment customers:

- By Purchase Volume – Large retailers vs. small retailers.
- By Product Preference – Some prefer selling SIM cards, others focus more on accessories.
- By Location – Urban customers may want premium products, while rural may prefer budget-friendly items.
- By Customer Type – Regular buyers vs. occasional buyers.

Steps to apply segmentation:

- Collect sales data from different retailers.
- Categorize them into groups.
- Plan targeted offers for each group.

Example: For high-volume retailers, offer bulk purchase discounts. For small retailers, provide combo packs at lower cost.

4. Benefits of Using These Techniques

- Cross-Selling → Increases average order value.
- Upselling → Boosts profit margins.
- Segmentation → Ensures right product is offered to the right customer.
- Overall Impact → Better customer satisfaction, stronger retailer trust, and higher sales growth.

4.1.6 Key Performance Indicators (KPIs) to Track Retailer Performance and Sales Growth

For a Distributor Sales Representative (DSR) in telecom products, simply supplying stock is not enough. To ensure that retailers are performing well and sales are increasing, it is important to track measurable indicators. These measurable values are called Key Performance Indicators (KPIs). KPIs help in checking how well a retailer is doing and whether your sales strategies are working.

KPIs for Retailer Performance

1. Sales Volume per Retailer

- Total quantity of telecom products purchased by each retailer within a specific time.
- Higher sales volume = stronger retailer performance.

2. Order Frequency

- How often the retailer places orders (weekly, monthly, etc.).
- Regular orders show healthy demand.

3. Product Mix Purchased

- Range of products bought (SIM cards, recharges, accessories, broadband devices).
- Retailers who buy a wide mix help in increasing overall distribution.

4. On-Time Payments

- Whether the retailer clears dues and payments promptly.
- Helps maintain smooth cash flow and trust.

5. Retailer Engagement

- Participation in brand schemes, promotions, or training.
- Active retailers are more committed to growing sales.

KPIs for Sales Growth

1. Month-to-Date (MTD) or Year-to-Date (YTD) Sales

- Total sales compared with the same period in the past.
- Shows whether sales are growing or declining.

2. Sales Growth Percentage

- Formula:

$$\frac{(\text{Current Sales} - \text{Previous Sales})}{\text{Previous Sales}} \times 100$$

- Measures the growth rate over time.

3. Average Order Value (AOV)

- Total sales ÷ Number of orders.
- Higher AOV means successful cross-selling and upselling.

4. Retailer Coverage

- Number of active retailers served vs. total retailers in the area.
- Shows how well the territory is being covered.

5. Product Category Growth

- Tracking sales growth in specific categories (e.g., fast chargers, 5G SIMs, or data packs).
- Helps identify trending products.

3. Benefits of Tracking KPIs

- Helps identify high-performing and low-performing retailers.
- Guides DSRs in planning better sales strategies.
- Encourages retailers through target-based incentives.
- Improves distribution efficiency and profitability.
- Provides data for decision-making and forecasting.

4.1.7 Using CRM-Generated Reports for Sales Analysis and Retailer Prioritization

Customer Relationship Management (CRM) systems provide sales reports that help a Distributor Sales Representative (DSR) track retailer performance. These reports show sales history, product demand, and payment behavior. By analyzing them, a DSR can identify high-priority retailers and focus on them for better engagement and higher sales.

How to Analyze CRM Reports

- Check Sales History – See which retailers buy regularly and in good volume.
- Track Product Demand – Find out which telecom products (SIMs, recharges, accessories) are selling more.
- Compare Sales Trends – Look at growth or decline in orders compared to previous weeks/months.

Example: If the report shows that one retailer is steadily increasing accessory sales but dropping in SIM sales, you can plan to push SIM promotions with them.

Identifying High-Priority Retailers

- Retailers with high sales volume.
- Retailers showing consistent growth.
- Retailers in key market areas.

Example: A retailer who buys in bulk every week and pays on time is a high-priority customer.

Targeted Engagement

- Offer special schemes or discounts.
- Provide priority delivery and stock allocation.
- Share promotional materials or product training.

4.1.8 Strategies for Building a Strong Retailer Network and Onboarding New Retailers

A Distributor Sales Representative (DSR) must not only manage existing retailers but also expand the network by adding new ones. A robust retailer network ensures wider product availability, higher sales, and stronger market presence. Effective onboarding of new retailers builds trust and creates long-term business relationships.

1. Strategies for Building a Retailer Network

- **Market Mapping** : Identify potential areas and shops where telecom products can be sold (e.g., mobile stores, electronic shops, general stores).
- **Relationship Building** : Visit retailers regularly, listen to their needs, and provide timely support.
- **Value Addition**: Offer competitive prices, reliable delivery, and promotional support (posters, stands, demo kits).
- **Consistent Service** : Maintain regular stock supply and after-sales support to strengthen trust.
- **Example**: If a competitor is not supplying accessories regularly in a market, step in and provide assured delivery to win that retailer.

2. Strategies for Onboarding New Retailers

- **Initial Introduction** : Present yourself and your company's telecom products clearly.
- **Explain Benefits** : Show how stocking your products will increase their sales and profits.
- **Offer Starter Schemes** : Give attractive discounts, sample packs, or promotional offers to encourage first orders.
- **Training & Support** : Educate new retailers about product features, selling techniques, and recharge processes.
- **Regular Follow-Up** : Check in frequently during the initial weeks to solve issues and ensure satisfaction.

Example: When onboarding a new retailer for SIM cards, explain activation process, provide posters for shop visibility, and offer a small incentive on first activations.

3. Benefits of a Strong Retailer Network

- Wider market coverage.
- Stronger brand visibility.
- Better customer reach.
- Higher and consistent sales growth.

4.1.9 Identifying Retailers and Analyzing their Demands

A Distributor Sales Representative (DSR) must understand the retailers they serve. By identifying existing retailers and analyzing their current and future demands, a DSR can recommend the right telecom products. This not only increases sales but also strengthens retailer trust.

Step 1: Identify Existing Retailers

- **Review Records** : Check CRM data, past order history, and sales registers.
- **Visit the Market** : Note which retailers regularly buy telecom products (SIMs, recharges, accessories).
- **Classify Retailers** : Divide them into high-volume, medium-volume, and low-volume sellers.
- **Example**: A shop that buys SIM cards every week is a high-volume retailer, while another buying only once a month is low-volume.

Step 3: Analyze Future Demand

- Study Market Trends – New launches (e.g., 5G SIM cards, fast chargers) may create upcoming demand.
- Seasonal Demand – Festivals or exam season may increase demand for recharges and data packs.
- Growth Plans of Retailer – If a retailer is expanding their shop, they may want to stock more premium products.

Example: If the market is shifting toward wireless earphones, recommend that retailers start stocking them early.

Step 4: Recommend Suitable Products

- Suggest fast-moving products that match current demand.
- Introduce new or premium products to prepare retailers for future demand.
- Offer bundled options (e.g., charger + cable packs).

Example: For a retailer with high SIM sales, recommend adding data packs and recharge vouchers. For one focused on accessories, suggest premium fast chargers and wireless earphones.

4.1.10 Informing Retailers about Product Portfolio and Enrolling them for New Variants

A Distributor Sales Representative (DSR) plays an important role in expanding distribution coverage. Retailers need to be regularly updated about the company's product portfolio (the complete range of telecom products offered) and encouraged to stock new variants. This helps the company reach more customers while giving retailers opportunities to grow their business.

Step 1: Inform Retailers about the Product Portfolio

- Introduce the Full Range – Explain all categories (SIM cards, recharges, cables, chargers, earphones, broadband devices, etc.).
- Highlight Features and Benefits – Emphasize quality, warranty, demand, or profit margin.
- Use Simple Communication Tools – Share brochures, catalogs, demo kits, or mobile app presentations.

Example: “We offer SIM activations, data packs, and accessories like fast chargers and wireless earphones. These products are in high demand and give you good margins.”

Step 2: Enroll Retailers for New Variants/Products

- Explain the Opportunity – Show how the new variant meets customer needs (e.g., 5G SIM cards for 5G phones).
- Give Starter Schemes – Offer discounts, free samples, or combo packs for trial.
- Provide Training/Guidance – Teach retailers about features and selling points.
- Simplify Onboarding – Help them complete enrollment forms, activation steps, or digital registrations.

Example: When launching a new premium charger, explain its fast-charging ability, offer an introductory discount, and provide posters for shop display.

Step 3: Expand Distribution Coverage

- Target new market areas and non-traditional outlets (general stores, stationery shops) to place products.
- Encourage retailers to stock a wider range of products to cover more customer needs.
- Track adoption using CRM or sales records to see which retailers successfully added new variants.

4.1.11 Using Automated Tools to Track and Manage Leads

For a Distributor Sales Representative (DSR), leads are potential retailers or businesses who may be interested in selling telecom products. To ensure these leads convert into active retailers, it is important to use automated tools such as CRM (Customer Relationship Management) software or lead management apps. These tools help in tracking, following up, and onboarding retailers efficiently.

Step 1: Capture and Record Leads

- Enter retailer details (name, shop location, contact number, product interest) into the CRM or app.
- Tag leads based on category (e.g., SIM sellers, accessory sellers, new markets).

Example: A DSR visits a new shop owner interested in prepaid SIMs. Their details are entered into the lead management tool.

Step 2: Track Leads with Automated Tools

- Set Reminders – The tool alerts for follow-up calls or visits.
- Status Updates – Mark leads as New, In Progress, or Converted.
- View Dashboard – Check how many leads are pending, active, or successfully onboarded.

Example: The tool notifies the DSR to call a retailer within 3 days who showed interest in recharge vouchers.

Step 3: Ensure Timely Follow-up

- Use automated SMS, WhatsApp, or email reminders for quick communication.
- Schedule follow-up visits directly from the CRM calendar.
- Track previous interactions so every follow-up is relevant.

Example: Instead of asking the same questions again, the DSR checks past notes and says, “Last time you wanted to know about 5G SIM pricing—here are the details.”

Step 4: Onboard Retailers Smoothly

- Use the tool to share digital registration links or fill forms on the spot.
- Provide product catalogues and pricing details through app-based sharing.
- Confirm activation and mark the lead as Converted to Retailer.

Example: After a retailer fills the digital onboarding form in the app, the DSR updates the lead status to “Active Retailer.”

Notes



Lined area for taking notes, consisting of multiple horizontal lines.

UNIT 4.2: Merchandising, AI Tools, Professional Conduct, and Sales Planning

Unit Objectives

By the end of this unit, the participants will be able to:

1. Describe the impact of visual merchandising on customer attraction and product sales.
2. Demonstrate how to guide retailers in using merchandising tools effectively to maximize store visibility and customer engagement.
3. Discuss the benefits of AI tools in demand forecasting and inventory planning.
4. Show how to plan to cover the maximum retailer base within the territory using AI-based tools for demand forecasting and inventory planning.
5. Elucidate the importance of adhering to personal grooming and professional behavior standards.
6. Show how to maintain personal grooming and hygiene standards to create a professional impression.
7. Explain the role of social selling and digital marketing tools in modern sales processes.
8. Demonstrate how to determine daily, monthly, and quarterly sales targets by coordinating with the Territory Sales Manager (TSM) or Area Manager.
9. Demonstrate how to create a detailed plan by splitting monthly/quarterly targets into weekly and daily milestones.
10. Demonstrate how to collect and verify stock and merchandising materials from the manufacturer/distributor, ensuring no defective or damaged products are distributed.
11. Show how to use intelligent negotiation tactics to improve profitability and strengthen partnerships.

4.2.1 Impact of Visual Merchandising on Customer Attraction and Product Sales

Visual merchandising has a profound impact on customer attraction and product sales by creating a compelling and inviting shopping experience. It's not just about aesthetics; it's a strategic tool that influences consumer behavior and purchasing decisions from the moment they see the store.



Fig. 4.2.1 visual merchandising of telecom products

Attracting Customers

Visual merchandising acts as a "silent salesperson" that draws people in. An attractive window display can pique the curiosity of passersby, enticing them to enter the store. Once inside, an organized and visually appealing store layout makes customers feel comfortable and encourages them to browse for longer. This increased foot traffic directly translates into more opportunities for sales. Elements like creative lighting, appealing color schemes, and themed displays create a unique and memorable brand experience that makes a store stand out from its competitors.

Driving Product Sales

The impact on sales is direct and measurable. Visual merchandising influences buying behavior, particularly impulse purchases.

- **Product Visibility:** Strategically placing key products at eye level or in prominent displays ensures they are easily seen. When products are well-lit and neatly arranged, they appear more desirable and valuable to the customer.
- **Encouraging Exploration:** A logical and well-thought-out store layout guides customers through the store, leading them to new products they might not have otherwise noticed. Grouping complementary products together—for example, placing phone cases next to a new phone model—encourages customers to buy additional items.
- **Creating a Positive Impression:** A clean, organized, and aesthetically pleasing store environment makes the shopping experience more enjoyable. When customers feel good about a store, they are more likely to spend more time and money there, and are more inclined to return for future purchases.

4.2.2 Merchandising Tools Effectively to Maximize Store Visibility and Customer Engagement

Guiding retailers on effective merchandising involves a hands-on approach that shows them how to use tools you provide to increase visibility and customer interaction. Here's how you can demonstrate this:

1. Show, Don't Just Tell

Instead of simply dropping off materials, work with the retailer to set them up. This is your chance to demonstrate effective placement.

- **Window and Entrance:** Start by assessing the store's entrance and windows. Explain that these areas are the first point of contact with a customer. Place eye-catching posters or banners here to attract passersby.
- **High-Traffic Zones:** Identify areas with the most foot traffic, such as near the billing counter or main walkway. These are ideal spots for a point-of-sale (POS) display stand or promotional material, as they can trigger impulse purchases.
- **Aisle and Shelf Placement:** Work with the retailer to organize the shelves. Suggest placing fast-moving products or new launches at eye level to make them easy for customers to spot. Explain that this is where a customer's gaze naturally falls.

2. Explain the "Why" Behind Each Action

Explain the reasoning behind each merchandising decision. This helps the retailer understand the strategy and apply it themselves in the future.

- **Visibility:** "Placing this banner by the door helps people see our new offer from the street, pulling them into the store."
- **Customer Engagement:** "By grouping these phone accessories with the new smartphone display, we're making it easy for customers to see everything they need in one place, which encourages them to buy more items."
- **Product Hierarchy:** "Putting our most profitable product here, at eye level, makes it the first thing customers see, which increases the chance of a sale."

3. Use Tools to Tell a Story

Merchandising tools aren't just for holding products; they can tell a story about the brand or product.

- **Create a Themed Display:** If there's a new product launch, use a display stand with a clear theme. For a new smartphone, for example, create a display that highlights its key features like camera quality or battery life.
- **Utilize Lighting:** If possible, show them how to use available lighting to highlight specific products or displays. A well-lit product looks more premium and inviting.

By actively demonstrating these techniques, you're not just a supplier; you become a partner invested in the retailer's success. This builds trust and strengthens your business relationship.

4.2.3 Benefits of AI Tools in Demand Forecasting and Inventory Planning

A Distributor Sales Representative (DSR) must ensure that the right telecom products are available at the right time for retailers. Traditional methods of guessing demand often lead to stock shortages or overstocking. Artificial Intelligence (AI) tools help solve this by analyzing sales patterns, customer behavior, and market trends to make accurate forecasts. This allows better inventory planning and improved sales performance.

Benefits of AI in Demand Forecasting

1. Accurate Predictions

- AI studies past sales, seasonal demand, and customer buying behavior.
- Helps forecast demand for SIM cards, recharges, and accessories.

Example: AI predicts that demand for data packs will rise during the exam season when students need more internet.

2. Faster Decision-Making

- Provides real-time insights instead of relying only on manual records.
- Saves time and helps the DSR respond quickly to changing market needs.

3. Reduced Stock-Outs

- Ensures that retailers don't lose customers because products are unavailable.
- Maintains consistent supply of fast-moving items.

Benefits of AI in Inventory Planning

1. Optimal Stock Levels

- AI recommends how much inventory to keep—neither too high nor too low.
- Avoids overstocking of slow-moving products like outdated chargers.

2. Cost Efficiency

- Prevents losses from expired SIM packs, damaged goods, or unsold stock.
- Reduces unnecessary storage and logistics costs.

3. Market Preparedness

- Helps retailers stay ready for new launches like 5G SIMs or wireless earphones.
- Ensures availability during peak seasons and festivals.

4.2.4 Maximizing Retailer Base Using Ai-based Tools for Demand Forecasting and Inventory Planning

Leveraging AI for sales planning is a game-changer for a Distributor Sales Representative (DSR), allowing you to move from guesswork to a data-driven strategy. This process ensures you cover the maximum number of retailers efficiently and effectively. Here's a step-by-step guide on how to plan your territory using AI tools for demand forecasting and inventory planning.

Step 1: Get the Data from AI-Based Tools

Your first step is to access the insights provided by your company's AI-based system. This system analyzes vast amounts of data to give you a clear picture of your territory.

- **Demand Forecasting:** The AI will predict which products will be most in demand in specific areas or for particular retailers. It does this by analyzing past sales data, seasonal trends (e.g., higher sales of a particular smartphone model during a festival), and even external factors like local events or promotions by competitors.
- **Inventory Planning:** The AI tool uses the demand forecast to recommend the optimal inventory levels for each retailer. It can highlight which retailers are at risk of a stockout (running out of products) and which might be overstocked.
- **Retailer Segmentation:** The AI may also segment your retailers based on their potential. This helps you prioritize who to visit. For example, a "Tier 1" retailer might be a high-volume outlet with strong growth potential, while a "Tier 3" retailer might be a smaller store with lower sales.

Step 2: Map Your Territory Based on AI Insights

Once you have the data, you can plan your route and visits. This is where AI's power is truly felt, as it helps you move beyond a simple "A to B" route.

- **Prioritize High-Value Visits:** Instead of visiting retailers in geographical order, you prioritize based on the AI's recommendations. You might start your day with the retailers the AI has flagged as having an immediate need, such as a high-demand product that is about to go out of stock.
- **Optimize Your Route:** AI-based tools often include route optimization features. These tools use real-time data like traffic conditions and road closures to create the most efficient daily travel plan. By following an AI-optimized route, you can save significant time and fuel, allowing you to visit more retailers in a single day.
- **Balance Your Workload:** The AI can help you manage your time by showing you which retailers require more attention. For instance, a retailer identified by the AI as having a high growth potential might need a longer visit to discuss merchandising and sales strategy, while a routine stock check at another store might be quicker.

Step 3: Execute Your Plan and Provide Feedback to the AI

Your role doesn't stop after the plan is made. The AI system gets smarter with new data, and your input is critical.

- **Collect Real-Time Data:** As you visit each retailer, use your company's app or system to log your activities. This includes confirming stock levels, noting damaged products, and recording sales numbers. This data feeds back into the AI system, improving its future predictions.
- **Provide Context:** Sometimes, a sudden spike in sales isn't just a trend—it could be due to a local event you attended or a special promotion you ran. Provide this context to your TSM so it can be added to the system, helping the AI learn and become more accurate over time.
- **Adapt on the Fly:** The AI is your assistant, not your boss. If you notice a sudden, unpredicted demand for a product at a retailer, you can use the AI's data on nearby retailers to see if you can reallocate stock to meet that need. This is a real-world example of using the AI's information to make a quick, smart decision.

4.2.5 Importance of Adhering to Personal Grooming and Professional Behavior Standards

Adhering to personal grooming and professional behavior standards is not just a matter of appearance; it is a fundamental aspect of building trust, credibility, and long-term success in any business role, especially in a customer-facing one like a Distributor Sales Representative (DSR). These standards are crucial because they directly impact how you are perceived by others and how effective you are in your job.

1. Creating a Professional First Impression

The first few seconds of an interaction are critical. Your appearance and behavior immediately communicate a message to your business partners. A well-groomed and professionally dressed individual gives the impression of being organized, competent, and serious about their work. This is the foundation of a professional relationship. Conversely, a messy appearance can suggest a lack of attention to detail and a casual attitude towards the job, which can make a potential business partner hesitant to trust you.

2. Building Credibility and Trust

Trust is the currency of sales. When you represent your company, you are its face. Professional behavior, such as punctuality, politeness, and active listening, shows respect for the retailer's time and business. When you show up on time for an appointment, you are telling the retailer that their business is important to you. When you listen to their concerns, you are demonstrating that you care about their success. This builds a foundation of trust that makes it easier to negotiate, solve problems, and forge a lasting partnership.

3. Reflecting the Company's Brand and Values

As a DSR, you are not just representing yourself; you are representing your company. Your personal conduct is a direct reflection of the company's brand and values. If you are professional, reliable, and well-presented, you enhance the reputation of your company. This can give you a significant advantage over competitors who may not prioritize these standards. A strong brand image, reinforced by a professional sales force, makes it easier to sell products and build a loyal customer base.

4. Enhancing Self-Confidence and Attitude

Adhering to professional standards also has a positive internal impact. When you look and act the part, you feel more confident and in control. This self-confidence can positively influence your attitude, making you more resilient in the face of challenges and more effective in your interactions. A positive and professional attitude is contagious and can make a business interaction more pleasant and productive for both parties.

In conclusion, personal grooming and professional behavior are not superficial requirements. They are essential tools that enable you to effectively attract and retain business partners, build a credible reputation, and ultimately achieve your professional goals.

4.2.6 Maintaining Personal Grooming and Hygiene Standards for a Professional Impression

A sales representative's first impression often determines how seriously customers, retailers, or colleagues perceive them. Personal grooming and hygiene reflect professionalism, discipline, and respect for others. A well-groomed appearance helps in building trust and credibility while poor grooming can create doubts about one's seriousness and reliability.



Fig. 4.2.2 Reasons for personal grooming

Key Aspects of Personal Grooming and Hygiene

1. Cleanliness and Hygiene

- Bathe daily and maintain fresh body odor.
- Keep nails trimmed, clean, and free from dirt.
- Maintain oral hygiene – brush twice a day, use mouth freshener if needed to avoid bad breath.
- Wash hands frequently, especially before meeting customers or handling products.

2. Appropriate Dressing

- Wear neat, ironed, and well-fitted clothes suitable for field visits or meetings.
- Avoid flashy or overly casual attire; prefer simple and professional dressing.
- Use clean shoes and ensure they are polished regularly.

3. Hair and Face Care

- Keep hair neatly trimmed or tied depending on style.
- Maintain a clean-shaven or well-trimmed beard/moustache for a tidy look.
- Avoid excessive use of perfumes, oils, or cosmetics.

4. Accessories and Presentation

- Use minimal and professional accessories like a simple watch or pen.
- Carry a clean handkerchief or tissue.
- Maintain a professional bag for carrying documents or samples.

5. Posture and Body Language

- Stand and sit upright to project confidence.
- Maintain eye contact while speaking.
- Avoid chewing gum, loud talking, or careless gestures in professional settings.

Why It Matters

- Creates trust – A well-groomed representative is seen as reliable and competent.
- Boosts confidence – Good grooming makes you feel positive and motivated.
- Builds relationships – Retailers and customers feel respected when they interact with a presentable professional.
- Supports career growth – Consistent professionalism enhances reputation and future opportunities.

4.2.7 Role of Social Selling and Digital Marketing Tools in Modern Sales Processes

In today's competitive market, customers are more informed and connected than ever before. They research products online, compare alternatives, and read reviews before making a purchase. To succeed in this environment, sales representatives must use social selling and digital marketing tools effectively. These tools not only increase visibility but also help in building long-term relationships with retailers and customers.



Fig. 4.2.3 Social selling

1. Social Selling

Social selling refers to using social media platforms such as WhatsApp, Facebook, Instagram, or LinkedIn to connect with retailers, showcase products, and maintain regular communication.

Key Roles:

- Build stronger retailer relationships through direct and personalized interaction.
- Share product updates, offers, or training videos instantly.
- Respond quickly to queries and provide after-sales support.
- Increase trust by being visible and accessible online.

Example: A distributor sales representative shares weekly telecom product updates in a retailer WhatsApp group, helping retailers stay informed and encouraging repeat orders.

2. Digital Marketing Tools

Digital marketing tools include apps, software, and platforms that help promote, track, and manage sales processes online.

Key Roles:

- Email and SMS Campaigns: Send promotions, discounts, or reminders to retailers.
- E-commerce & Ordering Apps: Make stock booking easier and faster for retailers.
- Analytics Tools: Track sales trends, retailer buying patterns, and customer engagement.
- Digital Catalogs: Share product brochures, price lists, and offers without printing costs.

Example: A telecom accessories distributor uses a mobile app to show new products to retailers, record their orders digitally, and track deliveries.

Benefits of Social Selling & Digital Marketing Tools

- Wider Reach: Connects with more retailers beyond physical boundaries.
- Cost-Effective Promotion: Saves time and money compared to traditional methods.
- Real-Time Updates: Enables instant sharing of new product launches or price changes.
- Data-Driven Decisions: Sales reps can analyze retailer behavior and adjust strategies.
- Customer Loyalty: Regular online engagement keeps the retailer connected and loyal.

4.2.8 Determining Daily, Monthly, and Quarterly Sales Targets

A Distributor Sales Representative (DSR) plays an important role in achieving the sales goals of the company. These goals are not decided in isolation but are set in coordination with the Territory Sales Manager (TSM) or Area Manager (AM). Sales targets are usually broken down into daily, monthly, and quarterly goals so that progress can be monitored and corrective actions can be taken in time.

1. Understanding Overall Sales Targets

- The TSM/AM communicates the company's sales targets for a product category, brand, or territory.
- These targets are based on market potential, past performance, retailer demand, and seasonal trends.

2. Breaking Down the Targets

Quarterly Targets:

- These are long-term goals for three months.
- They provide the big picture of what needs to be achieved in the territory.
- Example: ₹9,00,000 worth of telecom accessories in one quarter.

Monthly Targets:

- Quarterly targets are divided into three parts for each month.
- Adjustments are made based on expected demand (e.g., festivals or new launches).
- Example: ₹3,00,000 sales target for the first month.

Daily Targets:

- Monthly targets are further split into daily achievable goals.
- These help the DSR stay focused on daily calls and retailer conversions.
- Example: ₹10,000 sales per day if the month has 30 working days.

3. Steps to Determine Sales Targets with TSM/AM

- Review Past Sales Data – Analyze previous sales records to understand trends.
- Assess Retailer Potential – Identify top-performing and low-performing retailers.
- Factor in Market Trends – Consider product seasonality, competition, and new product launches.
- Agree on Targets – Finalize achievable quarterly, monthly, and daily goals with TSM/AM.
- Plan Retailer Coverage – Ensure daily retailer visits align with the sales target.
- Track and Report – Provide daily updates to TSM/AM and adjust plans if shortfalls occur.

4. Why Coordination with TSM/AM Matters

- Ensures that targets are realistic and achievable.
- Aligns the DSR's efforts with the company's strategic goals.
- Helps in resource planning – inventory, promotions, and retailer support.
- Builds accountability and enables timely guidance from seniors.

4.2.9 Creating a Detailed Sales Plan: Splitting Monthly/Quarterly Targets into Weekly and Daily Milestones

Sales targets become easier to achieve when they are broken into smaller, manageable milestones. Instead of looking at a big monthly or quarterly number, a Distributor Sales Representative (DSR) should prepare a weekly and daily plan. This helps in monitoring progress, identifying shortfalls early, and making corrective actions on time.

1. Start with the Overall Target

- Example (Quarterly Target): ₹9,00,000 sales in 3 months.
- Monthly Target: ₹3,00,000 per month.

2. Break Down into Weekly Targets

- If a month has 4 weeks → divide ₹3,00,000 by 4.
- Weekly Target = ₹75,000.
- This helps track performance every 7 days, instead of waiting till month-end.

3. Split into Daily Milestones

- Assume 25 working days in the month.
- Daily Target = ₹3,00,000 ÷ 25 = ₹12,000 per day.
- This daily milestone guides how many retailer visits and product pitches need to be made.

4. Create a Detailed Plan

Level	Target Value	Action Plan Example
Quarterly	₹9,00,000	Expand retailer network, plan promotions with TSM/AM
Monthly	₹3,00,000	Focus on top 30 retailers + 10 new retailers
Weekly	₹75,000	Achieve through 5 retailer visits/day × 6 days
Daily	₹12,000	Convert minimum 3 orders/day with average ₹4,000 value

5. Steps to Prepare the Plan with TSM/AM

- Review targets – Confirm monthly/quarterly goals from TSM/AM.
- Identify retailers – Categorize high-potential, medium, and low-potential retailers.
- Set weekly milestones – Distribute targets based on retailer category and seasonality.
- Fix daily goals – Define minimum retailer visits, order size, and product focus.
- Track progress – Record achievements in a sales register or app daily.
- Adjust strategy – If weekly goals are not met, increase retailer visits or focus on cross-selling.

6. Benefits of Weekly and Daily Milestones

- Prevents last-minute pressure at month-end.
- Helps in identifying gaps early and correcting them.
- Increases focus on daily productivity.
- Provides a clear roadmap to achieve higher sales efficiency.

4.2.10 Collecting and Verifying Stock and Merchandising Materials

As a Distributor Sales Representative (DSR), one of the key responsibilities is to collect stock and merchandising materials from the manufacturer or distributor and ensure that only quality, defect-free products reach retailers. Distributing damaged or defective products can reduce retailer trust, create complaints, and harm the brand's image.

1. Collecting Stock and Merchandising Materials

- Follow proper documentation: Receive stock against invoices, delivery challans, or stock issue slips.
- Cross-check quantity: Match the received stock with the invoice to ensure correct numbers.
- Ensure safe handling: Use appropriate transportation methods to avoid product damage.
- Collect merchandising items: Such as display stands, posters, banners, danglers, and product brochures along with stock.

2. Verifying Stock Quality

- Check packaging: Ensure cartons, boxes, and product packaging are intact without tampering.
- Inspect physical condition: Look for cracks, scratches, dents, or moisture damage in telecom products/accessories.
- Check product labels: Verify MRP, batch number, and manufacturing/expiry dates.
- Confirm serial numbers/IMEI (if applicable): For devices like smartphones or smart accessories.
- Test samples (if required): Randomly check a piece from the lot to confirm working condition.

3. Verifying Merchandising Materials

- Visual inspection: Ensure posters, banners, and stands are clean, undamaged, and ready for display.
- Quantity check: Match merchandising material with dispatch list.
- Brand guidelines: Confirm that the material reflects the correct brand logos, colors, and messages.

4. Handling Defective or Damaged Products

- Segregate immediately: Keep defective/damaged stock separate from good stock.
- Report to distributor/manufacturer: Record defects in the goods return note (GRN) or damage register.
- Do not distribute: Ensure such items never reach the retailer.
- Replace or return: Follow company policy for replacement or credit note adjustment.

5. Why This Process Matters

- Maintains trust and satisfaction among retailers.
- Ensures only authentic and quality products reach the market.
- Prevents losses from returns and complaints.
- Protects the brand image in a competitive market.

4.2.11 Using Intelligent Negotiation Tactics to Improve Profitability and Strengthen Partnerships

Negotiation is a daily part of a Distributor Sales Representative's work—whether it is with retailers on pricing, margins, or display space, or with distributors and manufacturers on schemes and support. Intelligent negotiation is not just about “winning” a deal, but about creating value for both sides, so that the relationship is long-lasting and profitable.



Fig. 4.2.4 Strategies and Tactics for Sales Negotiation

1. Prepare Before Negotiation

- Know your product well: Be clear about features, advantages, and price points.
- Study retailer needs: Understand their sales volume, customer preferences, and challenges.
- Set your limits: Decide the minimum margin or price you cannot go below:

2. Intelligent Negotiation Tactics

Build Relationships First

- Start by creating trust and rapport.
- Show genuine interest in the retailer's business.
- A strong relationship reduces price pressure and increases cooperation.

Focus on Win–Win Outcomes

- Instead of only talking about discounts, highlight mutual benefits.
- Example: “If you display this new product prominently, I’ll support you with promotional material and extra margin.”

Use Data and Evidence

- Present sales data, market trends, and competitor comparisons.
- Example: “Retailers who stocked this accessory last month saw a 20% increase in add-on sales.”

Listen Actively

- Allow the retailer to share their concerns.
- Acknowledge their points before presenting your offer.
- This makes the retailer feel respected and more open to agreement.

Apply the “Small Wins” Strategy

- Break larger negotiations into smaller agreements.
- Example: First agree on product quantity, then on display, then on payment terms.

3. Benefits of Intelligent Negotiation

- Improves profitability: Avoids unnecessary discounting while maintaining margins.
- Strengthens partnerships: Retailers feel they are working with a supportive partner, not just a seller.
- Builds loyalty: Retailers prefer long-term relationships with professionals who balance fairness with value.
- Encourages cooperation: Retailers become more willing to adopt new products and promotions.

Exercise



Multiple Choice Questions:

1. Visual merchandising mainly helps in:
 - a) Reducing product costs
 - b) Attracting customers and increasing sales
 - c) Maintaining stock records
 - d) Controlling distributor expenses
2. Which of the following is an example of AI in sales planning?
 - a) Using banners and posters in stores
 - b) Predicting future demand based on past data
 - c) Negotiating with retailers on discounts
 - d) Dressing professionally for meetings
3. Personal grooming and hygiene standards are important because:
 - a) They reduce stock wastage
 - b) They improve the professional impression and build trust
 - c) They help in price negotiations only
 - d) They increase product discounts
4. Social selling can be best described as:
 - a) Selling only through door-to-door visits
 - b) Using social media and digital platforms to engage retailers and customers
 - c) Selling only to close friends and family
 - d) Using posters for product visibility
5. While collecting stock from a distributor, the DSR must first:
 - a) Check packaging, labeling, and product condition
 - b) Deliver it directly without verification
 - c) Reduce the price for defective products
 - d) Only count the number of cartons

Short Questions:

1. Explain how AI tools help in inventory planning for a sales representative.
2. How does splitting a monthly target into weekly and daily milestones improve performance?
3. Mention two intelligent negotiation tactics a DSR can use to strengthen retailer partnerships.

Fill in the Blanks:

1. _____ helps in predicting product demand and avoiding stock-outs.
2. A well-groomed sales representative creates a strong _____ impression on retailers and customers.
3. Posters, banners, and display stands are examples of _____ materials.
4. The _____ or Area Manager helps the DSR finalize and monitor sales targets.

True or False:

1. Visual merchandising has no role in influencing customer buying behavior. ☐
2. Daily sales targets are derived from monthly and quarterly targets. ☐
3. Social selling is about building long-term relationships through digital platforms. ☐
4. Defective or damaged products should be distributed quickly to clear stock. ☐

Notes



Lined area for taking notes, consisting of multiple horizontal lines.





5. Employability Skills (30 Hours)

It is recommended that all training include the appropriate. Employability Skills Module. Content for the same can be accessed

<https://www.skillindiadigital.gov.in/content/list>







6. Annexure

Annexure I - QR Codes –Video Links









Telecom Sector Skill Council

Estel House, 3rd Floor, Plot No: - 126, Sector-44

Gurgaon, Haryana 122003

Phone: 0124-2222222

Email: tssc@tsscindia.com

Website: www.tsscindia.com