

Quest - Splus 45 - Sales and Retention

Guidance Notes



Module Outcome
<ul style="list-style-type: none"> An effective sales process that achieves sales targets and increases income for memberships, activities and products Upselling and cross-selling memberships, activities, and products Valued customers who maintain their membership for longer To create a process that encourages new customers to recommend friends and family Understanding your target market and your competition
PLAN
Challenge: How do you plan to increase membership levels and maximise the use of your programme?
<p>Examples of best practice</p> <ul style="list-style-type: none"> Understanding the local market (Demographics; Latent demand; mapping users to catchment; Facility's position; competitors; SWOT analysis; Use of Research) Products Defined Daily, weekly, and monthly sales targets Sales plans Staff involved in sales planning Retention programmes Key performance indicators (KPIs) and benchmarks for sales and retention Marketing and promotional plan Up-to-date systems to manage customer data Mystery visits/calls/audits Procedures and policy systems Office of Fair-Trading guidance.
<p>Suggested Guidance</p> <ul style="list-style-type: none"> Do management and staff understand their local market and have processes to keep up to date with information, including: <ul style="list-style-type: none"> The demographic of the local catchment Latent demand within the catchment Mapping existing users to the catchment to identify target markets The Facility's position/perception within the catchment The competitors within the catchment and how their activity influences facility decision-making processes A SWOT analysis (Strengths, Weaknesses, Opportunities, and threats) of the local market and catchment

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- Has the facility defined what it is selling and does it cover all areas of the facility, for example, types of memberships, personal training, children's parties, and swimming lesson direct debits
- Have relevant facility and individual monthly, weekly, and daily sales targets been identified and set, for example, target number of members to enrol each month
- Are daily, weekly, and monthly sales plans in place to support the sales process and achieve financial outcomes set out in the financial plan and business plan
- Are staff involved in the planning of the sales process and how sales objectives will be achieved
- Is there evidence that retention programmes have been developed and targets set, that are monitored to keep existing customers; are attrition rate targets in place in all areas
- Has the facility determined appropriate KPI benchmarks to manage sales performance, such as expected enquiries to appointments, % rate or expected tour to sale % rate? Has the facility determined appropriate KPI benchmarks to manage retention performance, such as targeted attrition rates, retention rates, average length of membership
- Is there a planned programme of marketing activity, which is reviewed, and adjustments made where necessary, to achieve the sales and retention targets
- Are there up-to-date systems for recording customer information and managing customer data to help turn leads into sales and generate loyalty amongst existing members/users
- Does the facility plan mystery visits/calls and/or audits to help test the sales process from the customer's perspective
- Procedures and policies for how the sales process works are developed, defined, and documented as part of an integrated quality management system and/or sales manual, for staff and where appropriate customers
- Does the membership process comply with the standards created by the Office of Fair Trading?

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DO
Challenge: How do you communicate the sales and retention programme to staff and stakeholders?
<p>Examples of best practice</p> <ul style="list-style-type: none"> • Sales procedure communication • Sales and Retention performance communication • Sales Process • Competitor analysis updates • Marketing updates • Social media, Apps, and the website • Mystery visits/Sales audits • Staff one to ones • Staff performance review • Online membership application • Publication of relevant performance or project reports.
<p>Suggested Guidance</p> <ul style="list-style-type: none"> • Communication procedures are established and effectively implemented for the staff, to enable two-way communication that shares current progress and future initiatives, promotions, and actions to help develop the sales and retention programmes • Are staff informed and updated with the current sales and retention performance figures on a daily, weekly, and monthly basis, including staff meetings, sales performance leader boards, white boards in offices • Is the sales process outlined in a simple step-by-step educational and best practice document for staff • Is there evidence that the findings from competitors are cascaded to staff and used in the sales process • Are staff informed about the success or failure of marketing/ promotional campaigns and able to give feedback to influence future campaigns • Is social media used to engage staff in communicating the commitment to achieving sales and retention targets, for example, staff Facebook page and Twitter accounts • Does the facility feedback to staff on the findings from mystery visits and/or sales audit reports; is the information used to train and coach staff to improve services • Is there evidence of one-to-one motivational chats to help improve sales and retention performance with formal follow-ups for outcomes and objectives discussed • Is there a process for regular formal performance reviews with staff • Is the online membership process aligned with the process for membership transactions in person • Are annual performance reports or project progress reports shared on the organisation's website and/or with partners directly?

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DO

Challenge: What training has been delivered to ensure that the staff are equipped with the skills to successfully sell and retain customers?

Examples of best practice

- Financial plan/Business plan
- Sales process Training programme
- Product knowledge training
- Staff can sell, up-sell and cross-sell
- External, specialist training
- Good customer service training
- Lead Salesperson trained to manage
- Training on sales and retention system
- Training on social media

Suggested Guidance

- Are staff aware of the financial and business targets – is this communicated on an ongoing basis
- Is there a Training programme in place that gives staff the skills to complete the sales process effectively, for example, covering how to handle enquiries, how to deal with walk-ins, how to handle appointments, how to up-sell/cross-sell, how to generate leads, how to convert leads, objection handling and product knowledge
- Are all staff able to sell and cross-sell effectively, do they understand their role in helping to achieve financial and sales targets? How is up-selling/cross-selling encouraged
- Has external training been considered for appropriate staff – for example, NVQs, CPD, training by sales specialists
- Is there a programme of induction and ongoing customer care training for all staff to help understand how good customer service contributes to the sales and retention of members
- Has the person leading the sales process been given appropriate training to manage the staff and the sales and retention procedures
- Has training on sales and retention ICT (or paper-based) systems been given to all appropriate staff
- Have staff been trained on how to make the best use of social media platforms, for example, do they know how to test different imagery or how to use seasonal vs evergreen campaigns?

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DO

Challenge: What resources have been allocated to achieve the sales and retention targets?

Examples of best practice

- Staff resource
- Staff time allocated
- Sales and lead management function. ICT systems and products to enhance the facilities' performance and sales process.
- Sales administration
- Sales designated areas
- Essential sales tools
- Marketing toolbox
- Staff incentives

Suggested Guidance

- Are sufficient staff resources in place to specifically focus on sales and retention programmes
- Is sufficient staff time allocated for the sales process to be developed and delivered
- Are ICT or manual systems in place to ensure effective sales and lead management? Have other ICT systems and products been developed/ purchased to enhance the facility's performance and sales process, such as text, electronic programs linked to fitness equipment, front-of-house management systems, 'Facebook' and retention software
- Are processes in place for managing and processing all sales administration, such as prospect management, sales application forms, payments, and direct debits
- Is there a sale designated area for meeting and facilitating potential members through the sales process as well as provision for proactive and reactive sales activities, such as telephone and email follow-ups
- Are essential sales tools in place to support staff and potential customers through the sales process, for example, enquiry forms and needs analysis forms for telephone and face-to-face contact with potential members, referral nomination forms, referral incentives for customers
- Has the facility developed a marketing toolbox for sales personnel, for example, letter templates, brochures, guest passes, up-to-date technology
- Are there staff reward schemes in place to reward staff for achieving sales and retention targets?

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MEASURE
Challenge: How do you measure?
Examples of best practice <ul style="list-style-type: none"> • Sales and retention figures • Financial and unit targets • KPIs • Staff performance • Retention and attrition tracked • Source reports • Customer feedback • Staff feedback • Mystery visits • Benchmarking
Suggested Guidance <ul style="list-style-type: none"> • Are the monthly and annual sales and retention figures measured against the previous year's actual • Have financial and unit targets been set against budgeted sales that are regularly monitored and measured • Have other KPIs been identified, and targets set; accordingly, including measurements for both facility and individual achievement, for example, scores from mystery visits and/or audits • Are individual staff and the sales team performances regularly monitored and measured • Is retention and attrition regularly tracked and measured • Are source reports in place with findings used to determine future sales activity, for example, where did sales come from adverts, signage, or referrals; is this data analysed and measured • Is customer feedback encouraged and recorded through various means, including comment forms, testimonials, customer forums and verbally; is the feedback analysed and measured. Does the customer feedback process in place measure the level of service customers receive during the buying, usage and exit stages? • Is staff feedback encouraged, analysed, and measured • Does the facility make use of mystery visits to test the customer experience and the sales process from enquiry to closure; are the findings analysed and measured • Is the sales and retention performance benchmarked across sites in the contract and with other organisations; are the findings measured?

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REVIEW

Challenge: How do you review what you measure?

Examples of best practice

- Sales and retention performance reviewed and discussed with staff
- Actions are put in place if targets are not met
- Management can change or amend aspects of sales and retention to ensure they remain 'live' and 'real'
- Procedure and policy systems.

Suggested Guidance

- Does the facility regularly review and discuss sales and retention performance with sales staff and agree on solutions to improve performance, for example at staff meetings?
- Is there evidence of actions being taken if sales and retention performance is not meeting targets; is support provided to staff that are not meeting performance targets
- Is there the ability for the management team to change and /or amend aspects of the sales and retention targets to ensure that they remain 'live' and 'real;' how do the staff improve the method of developing the sales process
- Does management have processes in place to regularly review and update relevant procedures and policies?

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IMPACT	
Challenge: Has what you have done made a difference?	
Examples of best practice <ul style="list-style-type: none"> • Impact on performance • Sales and retention target achievement • Sales KPIs • Retention and attrition • Prospect generation • Customer feedback • Mystery visits/audits • Celebration of success 	
Suggested Guidance <ul style="list-style-type: none"> • Can the facility management demonstrate improvements in the sales process that impact performance • Has the facility achieved or exceeded sales targets • Have retention and attrition targets been met or exceeded • Has the average yield per user increased • Is there an improvement in sales KPIs year on year • Are the facility's retention and attrition rates improving, are members staying for longer • Are more prospects generated via proactive sales activity to sales generated • Has there been an improvement in customer feedback/ satisfaction • Are the results in mystery visit reports/ audits improving • Are relevant staff rewarded for success? 	