

MONTHLY SALES REPORT

KIPLANG'AT NG'ENO
September 1, 2015

1 EXECUTIVE SUMMARY

This report contains the work done and the training received as of the beginning of the month of August. This was mainly in understanding the documentation process in sales (tender documents, quotations), site survey, brief overview on the sales process and key principles in sales. This month was spent working with a vibrant sales team and a lot of learning.

2 TRAINING PROGRESS

Worked on the tendering process and generating quotations for our clients. Further, we did site surveys that we then used to generate a comprehensive solution for our clients.

2.1 TENDERING

Worked on understanding the tendering process. Worked on a tender for Pride Inn Hotel with my colleagues. I gained useful insights into tendering process.

2.1.1 WORK DONE

- Generating the bill of quantities - The quantities required were decided with the team and the prices quoted alongside. This gave me an indepth understanding of the products.
- Finidng the necessary data sheets and user guides for the items selected. This gives the prospective client better insight into the selected products.

- Completing tender documentation and understanding the due diligence necessary such as stamping and scanning our own copy for reference.
- Attending the tender opening meeting. This completes the tendering process. The meeting also allows you to know our competitors in the industry.

2.2 SITE SURVEY FOR PROSPECTS

Sites surveys were done to be able to provide a better, more comprehensive solution for our clients. Two site surveys were done - East Africa Data Centre and CFC Stanbic bank branches

2.2.1 EAST AFRICA DATA CENTRE SITE SURVEY

This survey was for CCTV surveillance cameras. Gained better understanding in site layout and design consideration. We were accompanied by one of our technical team members who guided us through layout considerations. I also got to learn more with regard to our products' performance specifically Avigilon. Being on site also helped me appreciate the technical nuances of design and the overall capability of our products.

2.2.2 CFC STANBIC BRANCHES SITE SURVEY

this site survey was for fire alarm system. The RFP was for all the branches and thus we were required to undertake a complete survey. This was crucial as I understood the positioning of smoke and heat detectors, sounders and callpoints. This was followed up with a quotation.

2.3 SALES PROCESS OVERVIEW

I was given an overview of the sales process and how to close possible deals. A sample procedure I was given is as below;

- Initiation - This is where you are introduced to the client either by referral or by making an introduction yourself
- Understanding the clients' problem and coming up with a possible solution
- Write an email following up on the first meeting with what was discussed and request for a second meeting.
- Do a mini presentation of your solution in the second meeting and invite feedback from your prospect. This is aimed at building confidence.
- Write an indepth email following the second meeting. This should include your proposal with any changes that might have been discussed during the second meeting. Also do a quotation but DO NOT send it. Request a third meeting.

- During the third meeting, carry two print outs of your proposal and your quote on a separate print. Discuss your solution and present your tentative quote. Any changes discussed must be noted
- Write up an email with the same and request a fourth meeting where you now discuss all that entails to that project from the final cost to how the project will be undertaken.
- Pointers - Be observant to know your client, do not go for discounts and KNOW YOUR PRODUCT

3 CONCLUSION

I gained valuable insights into the products we have, the processes involved in sales and the entire sales process. It was an enriching learning experience. Looking forward to a fruitful September!