



Insurance
INSTITUTE OF EAST AFRICA



MARKETING AND SALES MANAGEMENT



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A Program which provides training for career success in the vital fields of sales and marketing, and the skills needed for success as a manager in marketing and sales.

Introduction

Marketing is often viewed as the most important function of any organisation; without effective marketing activities an organisation will be out of touch with customer needs, market situations and developments; and customers will not know about or have access to the products and services of the business. Along with the top-class selling ability required for success, knowledge is needed about markets, market research, distribution channels, marketing strategies, advertising, publicity, public relations, pricing strategies and more. Sales/marketing managers must also manage staff: recruit, motivate, guide, train and control them, and plan and organise their activities. This practical Program provides training on the wide-ranging duties of sales and marketing managers in the highly competitive world of business.

Course Contents

Module 1

Marketing, Selling and the Modern Commercial World

- Products - goods and services:
the differences between them
- The need for sales and marketing
- Public and private enterprise
- Types of enterprises:
industrial:
extractive, agricultural, processing,
refining, manufacturing, construction,
components
trading/distributive:
buying and selling
wholesale and retail, middle-men
service-providing
the interdependence of enterprises
- Buying motives - why people buy:
wants, needs, demands
- The benefits that products provide
- Necessities or essentials, luxuries or nonessentials
- The choice factor:
competitive products and brands
creating demand, persuasion
- Buyers:
differences between consumers and corporate buyers
- Buying motives of corporate buyers
- Professional corporate buyers
- Buying motives of consumers
- Determining buyer motives
- Motives and the interaction of sales and marketing activities
- The characters of buyers
- Definition, aims and activities of marketing:
marketing mix, audiences, messaging,
long-term orientation, product value,
brand loyalty, communication, customer relationships
- Comparing and contrasting sales and marketing

Module 2

The Market and Marketing

- Sales and marketing
- What the market comprises:
ready-made markets
market creation: practical example
- The marketing mix:
the original 4Ps:
Product, Price, Placement, Promotion
additional 3Ps for services:
People, Process, Physical Evidence
- Market strategy and planning
- Marketing research
- What marketing research seeks to ascertain:
types of data needed for effective planning demographics, market potential
- Consumer research:
consumer profiles
- Market segmentation:
competitive advantage
target and niche markets
- Market surveys
- Advertising research

- Advertising research
- Test marketing
- The need for and the cost of market research: cost-benefit assessment
- Planning research projects
- The effect of competition on the market: determining its strength: present and future
- How businesses can overcome competition: product differentiation
unique selling points (USPs)
USPs for small enterprises

Pricing Considerations

- Factors which affect the prices of consumer products
- Costs involved in manufacture and distribution
- Costs of storing and safeguarding products

- Costs involved in manufacture and distribution
- Costs of storing and safeguarding products
- The product and the demand for it
- Prices of competitive products
- Profit considerations: long-term or short-term durables, life-span, development costs
- Government intervention: buying and price restrictions
customs duties,
import controls,
exchange controls
- The psychological attitude of buyers: perceived value
prestige purchases
- Brand image and loyalty
- Price variations

Module 3

Channels of Distribution

- Classifications of channels: the “traditional” channels
- Distribution direct to consumers
- Distribution through wholesale businesses
- Distributing direct to retailers
- What wholesalers and retailers seek in products: profit margins, storage, turnover, reliability
- How wholesalers and retailers operate
- Distribution channel intermediaries: agents and representatives, brokers and consultants, value-added resellers (VARs)
- Selecting the right channel(s) for products
- Co-operative enterprises
- Chain stores/multiple shops
- Department stores
- Supermarkets and hypermarkets
- Do-it-yourself organizations, garden centres
- Franchising
- Groups of wholesalers and retailers
- Mail-order and direct mail business
- Door-to-door sales
- Methods of selling by telephone, telemarketing
- Email marketing and selling
- Club and catalogue and speciality selling

Internet Marketing

- Explanation of terms used in e-marketing: homepage, visit, pageview, hit, session, keyword, webmaster, browser
- Advantages of internet marketing
- Internet or e-marketing and the customer engagement cycle
- Search engines and search engine optimisation (SEO)
- Website structure: the website network
navigation
home page
main sections
subsections - the “money pages”
additional functionality of website design
- On-line payments and payment gateways
- Product deliveries
- Measuring web traffic
- Pay-per-click (PPC)
- Email marketing
- Overview on building effective distribution channels: focusing on end-users

- What forecasting involves:
 - the future, vision statements
 - Why forecasting is necessary in business
 - The relationship between forecasting and planning, and other stages in the business cycle
 - Factors to be considered in forecasting:
 - data accuracy, timeliness, relevance, history, market research, change, limitations of forecasts
 - Forecasting sales of durable products:
 - durability of products:
 - factors to consider, safety factors, testing of products
 - Quality:
 - contemporary definition:
 - fit-for-purpose
 - price consideration
 - expectations and perceived quality:
 - performance, standards, durability, reliability, support and back-up
 - Quality management systems (QMS)
 - QMS in marketing and sales:
 - resource management processes
 - supply of products and services processes
 - development and review processes
 - Quality management principles for marketing and sales:
 - customer focus, leadership, stakeholders, processes, continual improvement, fact-based decisions, supplier relations
 - Profit and the “break-even point”:
 - sales volumes, income, expenditure
 - Forecasting sales of fashion goods
 - Sales planning for profits:
 - short-term and long-term
 - who is involved and their responsibilities
- The Product Life Cycle (PLC)**
- The meaning of PLC
- Stages in a typical product life cycle examined:
 - introduction, growth, maturity, decline
 - factors and sales/marketing concerns at each stage
 - Implications for sales and marketing managers of PLCs
 - Product ranges
- Budgets and Budgetary Control**
- What budgeting is
 - Benefits which can accrue to the sales and marketing departments and the enterprise as a whole from accurate budgeting
 - Limiting factors to consider in budgeting:
 - demand, productive capacity, other factors
 - Obtaining data for sales budgets:
 - the relationship with sales forecasts
 - Marketing budgets:
 - range of expenses, example of a sales & marketing budget
 - Production budgets:
 - purchasing and stock levels
 - Cash budgets
 - Interrelationship of cash and purchasing with sales and marketing budgets
 - The master budget
 - Budgetary control by the sales/marketing manager
 - Budget review statements:
 - factors to be taken into account variances:
 - favourable and unfavourable
 - understanding reasons for variances
 - corrective action
 - Dangers of an inflexible attitude towards budgets:
 - management attitudes

The Promotional Mix

- Target audiences
- Communications devices:
the elements of the promotional mix:
intended effects, customer contact,
response time
- Marketing communication:
shared meaning
components of communications:
sender, receiver, message, encoding,
channel/medium, decoding, feedback,
noise
- Integrated marketing communications (IMC)
- The 'P's' of the promotional mix
- IMC factors:
image and brand, value proposition,
audience profile
structure and purpose, budget,
theme and selling journey
the digital customer-lead IMC model
- The aims of advertising and publicity
- Selecting the most suitable and effective media options
- Indirect advertising and publicity
- Direct advertising and publicity
- Advertising to suit the product:
features to stress, uses, benefits, brands,
types of advert, copywriting, space
- The essentials of advertising
- Advertising standards authorities:
regulation, ethics and avoiding
misrepresentation
- Guidelines for advertisement content and design
- Countering falling sales:
advertising research
- Advertising agencies:
range of services offered,
costs and charges
advantages and disadvantages to their
employment
- Sales promotion:
aims of sales promotion campaigns,
time period
- Special offers:
price reductions, extra quantities
making use of wrappers and packaging
discount vouchers, trading stamps,
competitions, sponsorship
- The loss leader concept
- Keeping subordinates in the picture
- Web-based sales promotion:
e-coupons and vouchers, sampling,
gift vouchers and wishlists, free
content
- Holding 'sales':
price reductions, objectives
- Exhibitions:
designing stands
training sales personnel to "man"
stands
- Public Relations:
the scope and objectives of PR
the meaning of "publics"
PR techniques:
controlled and uncontrolled media
how PR differs from advertising and from
sales promotion
in-house PR departments
PR consultancies
- Direct-mail marketing:
the message, mail shots,
advantages and drawbacks
- Point of sale and packaging

Social Media, Digital and Viral Marketing

- Social media:
community building and social media
consumer to consumer and
consumer-generated media
social bonding
social networking sites
- Viral marketing:
what it involves
essential elements for success in viral
marketing:
making use of human motivations
importance of "pass-along"
seeding or placement
discussion and bulletin boards
pitfalls to avoid
social media influencers:
their followers
marketing interaction and
collaboration with influencers
- Varieties of web display advertisements
- Sponsorship with website owners
- Behavioural marketing
- Interactive, reputation management, search engine and social media agencies

Marketing Strategy

- Review of the meaning, purpose and aim of marketing:
 - superior value, delivering satisfaction
- The marketing process:
 - the importance of customer value and satisfaction
- Creating customer value-driven marketing strategies
- Selecting customers to serve, segmentation
- Choosing a value proposition:
 - why customers engage with an organization and product instead of with competitive ones
- Marketing management orientations:
 - factors and marketing impact production concept:
 - affordability and availability
 - marketing concerns of cost, efficiency, mass-distribution
 - product concept:
 - quality, performance and innovative features for customers
 - marketing concerns of improvement and development
 - selling concept:
 - make-to-sell, heavy selling and promotional effort
 - aggressive and passive-aggressive approaches
 - marketing concept:
 - customer-centred philosophy of understand-and-respond
 - defined market, focus on customer needs and relationships
 - societal marketing concept:
 - consumer, society and enterprise's wellbeing
 - sustainable marketing, shared value
 - marketing myopia:
 - meaning, risks, effects
- Integrated marketing plans and programmes
- Creating strong customer relationships:
 - customer relationship management:
 - customer-perceived value
 - customer-perceived performance relative to their expectations
- Model of the marketing process and its key elements
- Strategic models for marketing management:
 - SWOT and TOWS analysis frameworks

- the 7Ps marketing mix
- the STP model
- the Product/Market Expansion Grid
- the Boston Consulting Group (BCG)
 - product portfolio matrix
- the Product Life Cycle model

- Questions asked by the models and strategies that result and occur
- Summary on strategic marketing

International and Global Marketing

- Reasons for engaging in export selling and marketing
- Visible trade and invisible trade
- Balance of trade and balance of payments
- Import controls, exchange control,
 - rates of exchange, customs duties
- Researching and determining overseas markets:
 - local demand,
 - social and economic standards
 - factors which increase prices in export markets
- PESTEL analysis for export selling and marketing:
 - political, economic, social, technological, legal and environmental factors
- Special problems in overseas selling
- Advantages to enterprises of exporting
- Methods of selling overseas:
 - buying agents
 - export houses
 - overseas agents
 - licensing overseas manufacturers
 - joint ventures and strategic alliances
 - export departments
- Methods of payment for exports:
 - documentary bills of exchange
 - letters of credit
 - other methods
- Internet export selling/online marketing:
 - benefits to customers/consumers,
 - benefits to sellers/marketers
 - considerations regarding payments, documentation, despatching, etc
 - the main international marketing decisions to be made
- Worldwide trends in business:
 - technological and communications advances
 - globalisation and networking

Module 7

The Importance of Selling and Salesmanship in the Modern Commercial World

- The persuasion factor
- The meaning of commercial selling
- Profit:
 - the profit motive
 - the importance of sales
 - the sales manager's role
- Why products must be sold
- The vital role of commercial selling
- Sales distribution chains
- The art and skills of salesmanship
- Customer wants, needs and buying motives
- Selling the benefits which products provide
- Special skills and qualities required in selling services
- The importance of recognising buying motives

The Steps in a Selling Transaction

- Attracting favourable attention to a product
- Arousing and maintaining interest in the product
- Creating and fostering a desire to buy the product
- Convincing prospects of the benefits of the product
- Persuading the prospect to buy - creating a customer
- Leading prospective consumers or customers through the steps

Sales Demonstrations

- The meaning and importance of demonstration
- Appealing to the senses
- The role of sales personnel in demonstrations
- Training sales personnel to give demonstrations
- The steps in a demonstration examined
- Practical example of a demonstration
- Selling the benefits of services

Related and Ongoing Sales

- What related sales are:
 - their value to sales personnel and to organizations
- When and how to try to make related sales
- When not to attempt to make related sales
- Incentives to customers to buy related items
- Ongoing sales:
 - examples

Module 8

Travelling Sales Personnel

- Comparison between the work of internal sales personnel and travellers:
 - environment
 - working hours
 - prospects and customers
 - sales aids
 - assistance
- Special personal attributes required by travelers
- Finding prospects:
 - sources and leads
 - Researching the territory and prospects
 - Getting to see new prospects:
 - making appointments,
 - telephone techniques
 - Planning sales journeys
 - Follow-ups
 - Journey cycles
 - Sales reports and records:
 - their importance to sales managers
 - the uses to which they can be put
 - Practical tips for travellers whilst travelling

Module 9

Management & Leadership, Training & Developing Sales Personnel

- What management is
- The purpose of management
- The technical aspect of a manager's job
- The managerial aspect of a manager's job
- Leadership:
 - qualities required
 - adaptability to situations
 - task-oriented and relationship-oriented styles
- Objectives and policies:
 - interpretation, implementation
- The functions of management:
 - planning:
 - strategic, operational and tactical
 - organising:
 - physical and human resources
 - co-ordinating
 - motivating & leading:
 - motivations, teamwork, communication
 - task needs, relationship needs
 - controlling:
 - standards, budgets, checks

Recruiting & Training Sales Personnel

- Sources of recruitment:
 - internal and external recruitment
- Job descriptions
- Employee specifications
- Advertising for sales personnel
- Employment application forms
- Employment interviews:
 - why they are held, their aims
 - advance planning and preparation needed
 - considerations in conducting interviews
- Selection and appointment
- The induction process:
 - what it should seek to achieve
 - what is involved
 - the importance of good procedures
 - induction checklists
- Training sales assistants and travellers:
 - what needs to be taught
 - types and methods of training:
 - classroom training, practical training, role playing

Module 10

Developing a Sales Team

- What diversification entails
- Expansion into new areas
- Locating new market areas
- Becoming established in a new area:
 - recruiting sales staff
 - the area/branch sales manager
 - the sales team leader
 - surveying the area
 - advertising and publicity
 - sale or return terms
 - training the new sales force
 - allocating sales territories
- Motivating and supervising the sales team
- Setting sales targets and assisting sales team members to achieve targets
- Organising sales teams
- Internal communication:
 - vertical and horizontal communication
- Communication within the sales department:
 - communication by telephone and mobile or cellphone
 - SMS and quick messaging
 - email communication and its advantages
 - remote access and using virtual private networks (VPN)

- Improving communication skills
- Control of the sales team
- Sales conferences and conventions
- Sales seminars
- More complex sales organisations:
 - the 'group' sales manager
- Leadership, teams norms, team values

Salesforce Remuneration

- Methods of remuneration:
 - salary-only terms
 - overtime or alternatives
 - commission and variations in sizes
 - according to circumstances and products/services being sold
 - commission-only terms:
 - variations to the basic method
 - salary plus commission terms
 - methods of remunerating sales team leaders/supervisors
- Bonuses, individual and collective bonuses
- Benefits
- Allowances for:
 - transport, accommodation/meals, entertainment, travel
 - the need for control over expenditure and claims

- Fringe benefits or perks:
what they might be and are provided
- Remuneration policy:
the sales/marketing manager's concerns
top management's dilemma in formulating
an acceptable policy
- Promotion of sales personnel:
vertical and horizontal promotion
promotion opportunities as motivating
factors

COVID-19, Pandemics, Virus Outbreaks

- Employers and salesforce management's responsibilities
- Spread and infection in the workplace
- Symptoms of coronavirus:
symptomatic employees and
asymptomatic employees
coronavirus posters and information
- Preventing the spread of COVID-19:
workplace measures
ventilation, physical distancing
hygiene, cleaning and disinfection of high-
traffic surfaces

PPE and face-masks
information and guidance on COVID-19
employee awareness, responsibility,
actions to take
risk assessments
vaccinations

- Testing for COVID-19 in the workplace
- Isolation and procedures for positive cases in the workplace
- COVID-19 and the sales team manager:
additional roles and responsibilities towards the team
new activities and efforts needed:
relating to remote working and working
from home
flexible working
work under coronavirus conditions
policies, work targets and KPIs
data transfer
new sales approaches
video conferencing
customer prioritisation
territory reviews
team health and well-being

Module 11

Credit Terms and Discounts

- Cash sales and credit sales
- Credit, credit facilities, credit terms
- Monthly accounts
- Fixed periods of credit
- Credit and debit cards issued by banks and by
credit card companies
- In-store credit cards:
building customer loyalty
- Leasing, contract hire/rental
- Instalment selling:
credit sale agreements
- Hire purchase:
special features
- Third-Party Payment Processors
- Consumer protection acts
- The importance of credit to industry and
commerce:
how it helps consumers as well
- Disadvantages and dangers in allowing credit
- Credit policy and credit limits
- Credit control by the sales manager:
keeping sales staff up to date with credit
policy details

ascertaining creditworthiness of potential
new customers

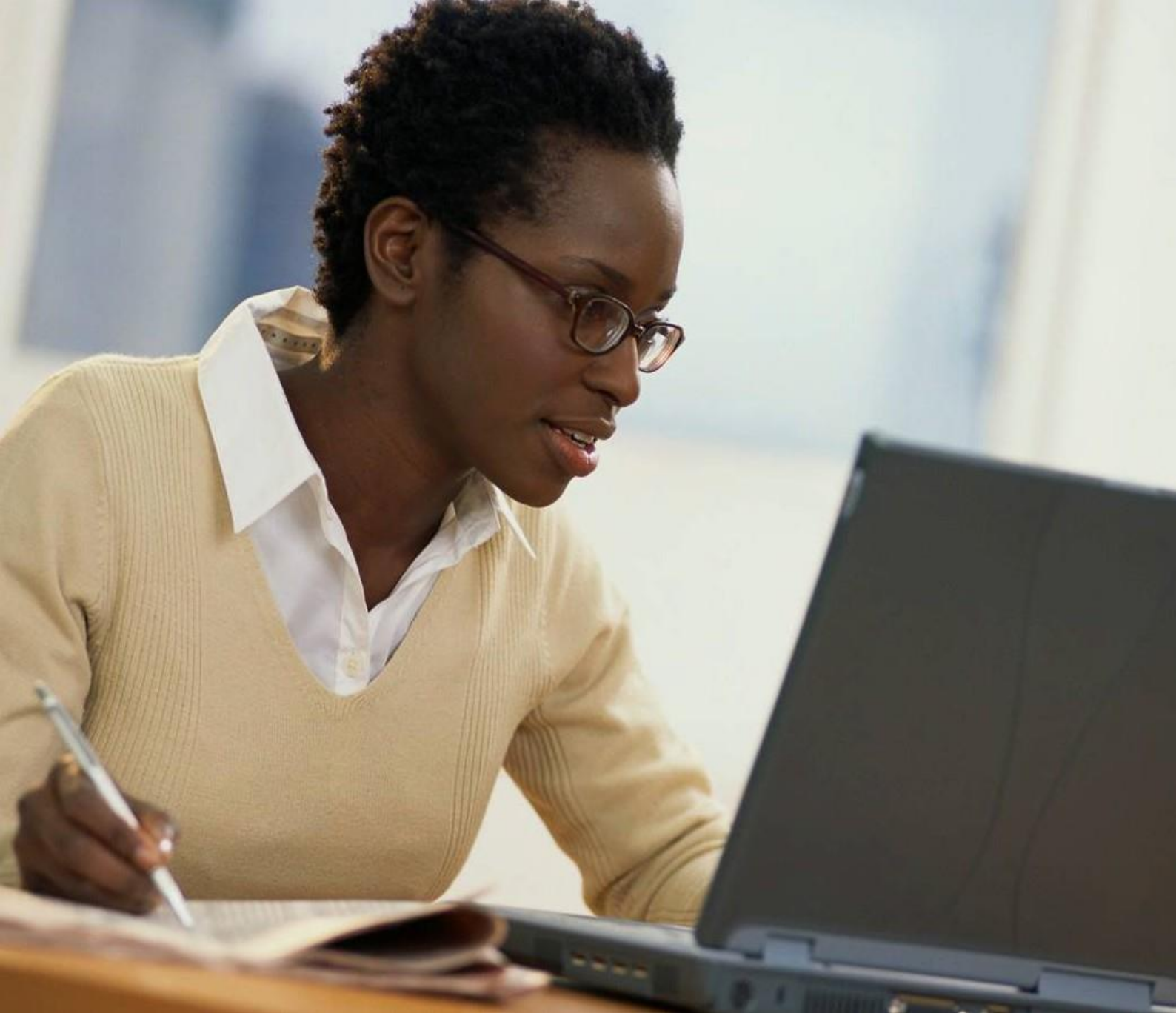
- Credit reports
- Trade discount to wholesalers and retailers:
why it is offered, RRP and list prices
- Quantity discount:
why it is offered, possible dangers
- Distinguishing between trade and quantity
discounts
- Cash discount:
circumstances in which it might be
offered
- Regular custom discount:
retaining regular customers
- Prompt payment discount:
why it is offered
- Trade-in or part exchange
- Keeping sales staff fully informed about
discounts offered and allowed
- Private labelling and own branding
- Manufacturers' guarantees and warranties:
why they are offered,
benefits to sales personnel
- After-sale service

- Objectives and types of sales letters:
 - creating interest in and inspiring action by the reader
 - Layout, appearance and contents of effective sales letters
 - Post scripts, bullet points, statistics, testimonials/recommendations
 - Styles of writing:
 - training sales staff to write good letters
 - First approach sales letters
 - Follow-up letters - the offer of something more
 - Circulars - personalising circulars, word processing
 - Sales literature:
 - catalogues, brochures, price lists, leaflets, pamphlets
- The Sales Office and Sales Records**
- What sales records are:
 - their importance and their uses
 - Maintaining sales records up to date:
 - sources and methods of obtaining data
- The sales office:
 - organisation and control
 - sources of information
 - processing data received
 - Sales statistics, analyses and graphs:
 - types and uses, linear and bar charts, graphs
 - practical examples
 - monthly, average monthly and total sales visualization and interpretation
 - Data protection:
 - the aims and principles
 - what needs to be protected and why
 - sensitive and confidential data
 - Data protection compliance:
 - valid reasons for holding and processing data
 - data accuracy and data minimisation
 - the data controller
 - Data retention policy
 - Data and the sales manager

Fee Structure

Ksh 75,000	Study Materials and Examination Fees
Ksh 3,200	Membership/Student Card
Ksh 8,700	Examination Invigilation Fees





To Enroll Contact us

Phone : +254 20 6530128 Safaricom: +254 723 334 408 Airtel: +254 -733 812 695

Or Email: info@iiea.co.ke or training@iiea.co.ke

Insurance Institute of East Africa
Brunei House, 3rd Floor | Witu Road off Lusaka Road
P.O. Box 16481 - 00100 Nairobi, Kenya
Tel: +254 20 6530128 | 6530298
Mobile: + 254 723 334 408 | 733 812 695
E-Mail: info@iiea.co.ke | www.iiea.co.ke