

Module 3: Institutional Business Development

Preparing Sales Analysis Using ERP

A. Meaning of Sales Analysis

Sales analysis is the process of evaluating:

- Revenue generated
- Customer-wise billing
- Service-wise performance
- Region-wise performance
- Monthly growth trends

B. Data Required from ERP

- Client master data
- Invoice reports
- Shipment volume reports
- Revenue reports
- Outstanding payment reports
- Credit limit utilization

C. Steps to Prepare Sales Analysis

1. Login to ERP
2. Download sales report (daily/weekly/monthly)
3. Filter by:
 - Customer
 - Region
 - Product type
4. Compare:
 - Current month vs previous month
 - Target vs achievement
5. Identify:
 - High-performing clients
 - Low-performing clients
 - Declining accounts

D. Importance

- Identifies growth opportunities
 - Helps in customer retention
 - Improves revenue planning
 - Supports management decisions
-

Process of Generating New Leads

A. Lead Sources

- Market visits
- Industrial area survey
- Online portals
- Referrals
- Cold calling
- Trade associations

B. Lead Generation Steps

1. Identify potential industries
2. Collect contact details
3. Enter lead data in ERP/CRM
4. Categorize:
 - Hot lead
 - Warm lead
 - Cold lead
5. Schedule follow-up

C. Lead Information to Collect

- Company name
 - Contact person
 - Phone & Email
 - Shipment volume
 - Current courier partner
 - Expected monthly business
-

Prospecting Institutional Client

A. Meaning of Prospecting

Identifying and qualifying potential institutional clients.

B. Steps

1. Research company background
2. Understand logistics needs
3. Fix appointment
4. Present company profile
5. Understand pain points
6. Offer customized solution
7. Submit proposal
8. Follow-up

C. Qualification Criteria

- Shipment volume
 - Payment capacity
 - Service requirement
 - Decision maker availability
-

Successful Negotiation Techniques

A. Preparation

- Know competitor rates
- Know minimum acceptable rate
- Understand customer requirement

B. Techniques

- Value-based selling
- Win-win approach
- Flexible pricing slabs
- Volume commitment strategy
- Handling objections professionally

C. Common Objections

- “Your rates are high”
- “We are satisfied with current vendor”

- “Need management approval”

D. Closing Techniques

- Offer trial period
 - Offer limited-time discount
 - Ask direct closing question
-

Payment Collection Process

A. Process Flow

1. Invoice generation
2. Invoice submission
3. Payment due tracking
4. Follow-up call
5. Reminder mail
6. Escalation if delayed
7. Payment receipt entry in ERP

B. Documents Required

- Invoice copy
- POD (Proof of Delivery)
- Statement of account
- GST details

C. ERP Use in Collection

- Aging report
 - Outstanding report
 - Credit limit monitoring
-

ERP in Improving Sales & Customer Retention

A. Sales Improvement

- Track sales target vs achievement
- Monitor sales executive performance
- Identify high revenue zones

B. Customer Retention

- Complaint tracking
- Feedback analysis
- Delay monitoring
- Service level reports

C. Retention Strategies

- Loyalty programs
- Discount slabs
- Priority service
- Relationship visits