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# Course : Analyze and optimize your customer portfolio

*Practical course - 2d - 14h00 - Ref. FEU*
*Price : 1500 CHF E.T.*

Implementing your sales management's strategy within your own portfolio means analyzing it and prioritizing your actions. This training course will show you how to implement a step-by-step approach to developing and managing your portfolio.

## Teaching objectives

**At the end of the training, the participant will be able to:**

- Segment your portfolio and identify potential customers and prospects
- Take a snapshot of the portfolio in terms of number, volume and potential
- Identify targets and determine sales priorities
- Set quantitative and qualitative activity targets
- Set up the resources plan and dashboard

## Intended audience

Sales representatives, technical sales representatives, business engineers. Anyone involved in sales development in a B-to-B environment.

## Prerequisites

Have a sufficiently significant volume of business and existing customers.

## Practical details

**Hands-on work**

Exercises enabling each participant to use the analysis matrix to build their own development and organization strategy.

**Teaching methods**

Active, participative teaching methods. Alternating theory/practice with application to the context and experience of participants.

## Course schedule


**PARTICIPANTS**

Sales representatives, technical sales representatives, business engineers. Anyone involved in sales development in a B-to-B environment.

**PREREQUISITES**

Have a sufficiently significant volume of business and existing customers.


**TRAINER QUALIFICATIONS**

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

**ASSESSMENT TERMS**

The trainer evaluates each participant’s academic progress throughout the training using multiple choice, scenarios, hands-on work and more.
Participants also complete a placement test before and after the course to measure the skills they’ve developed.

## 1 Understanding the foundations of Individual Sales Performance

- Short- and long-term sales effectiveness.
- Managing sales performance: organization and communication.
- Understand the marketing position of your products/services.
- Keep a history of your customers and business relationships.
- What are customers' expectations?

### Exercise

Sub-group exercise on customer expectations.

## 2 Take a snapshot of your customer portfolio

- Ten steps to developing your Sales Action Plan.
- Evaluate your customer portfolio.
- Portfolio segmentation, customer allocation.
- Classify customers according to their potential.
- Evaluate opportunities.

### Exercise

Set up a SWOT analysis of your sector.

## 3 Define your prospecting and loyalty actions

- Nominative qualification and global portfolio snapshot.
- Establish a factual diagnosis of your portfolio.
- Work on your "core targets".
- Determine actions and priorities.
- Develop a strategy with low-value customers.

### Exercise

Analysis of own portfolio: definition of actions and priorities.

## 4 Achieve sales targets

- Set sales targets: territory load.
- Set qualitative business objectives: salesperson's business potential.
- Set up sales development arguments.
- Use loyalty levers (telemarketing, e-mailing, etc.).
- Anticipate objections, plan fallback solutions.
- Define a pricing strategy and prepare counterparties.

### Exercise

Setting objectives and organizing work.

## 5 Improving profitability

- Set up a plan to maintain, develop, service and prospect customers.
- Setting up and using dashboards.
- Have a clear view of your schedule to manage your time and efficiency.

### Exercise

Organize sales activity follow-up.

### TEACHING AIDS AND TECHNICAL RESOURCES

• The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.

• At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.

• A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

### TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

### ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.