PAS 8401:2014

Implementing an inside sales management methodology – Guide

BRIDGE GROUP

bsi.

Contents

List of figures

List of tables

Foreword

This PAS was sponsored by BRIDGE International Corp. Its development was facilitated by BSI Standards Limited and it was published under licence from the British Standards Institution. It came into effect on 31 October 2014.

Acknowledgement is given to:

• Michimasa Yoshida – CEO and President of BRIDGE International Corp.;

• Toshihide Yagi – BRIDGE International Corp. and technical author of this PAS;

• Beth Rogers – University of Portsmouth and deputy technical author of this PAS.

In addition, acknowledgement is given to the following organizations/individuals that were involved in the development of this PAS as members of the steering group:

• Accenture Japan Ltd – Shigeki Iwasaki;

• BRIDGE International Corp. – Technical author team;

• BSI Consumer & Public Interest Network – David Sanders;

• Cisco Systems G.K. – Shinsuke Takahashi;

• DirectLink Co., Ltd. – Muneaki Nishimura;

• Holegeo Enterprise – Navin Kukadia;

• Institute of Sales and Marketing Management – Ben Turner;

• Intelligence Business Solutions, Ltd. – Tatsuya Oohira;

• Mentor Group – Jim McManus;

• On Channel Japan Co., Ltd. – Tomoko Kimura;

• Salesforce.com Co., Ltd. – Keiichiro Suzuki;

• S&I Co., Ltd. – Ryuichi Masuda;

• University of Portsmouth – Beth Rogers;

• VM Ware Corporation – Fuminori Saga.

Acknowledgement is also given to the members of the wider review panel who were consulted in the development of this PAS.

The British Standards Institution retains ownership and copyright of this PAS. BSI Standards Limited as the publisher of the PAS reserves the right to withdraw or amend this PAS on receipt of authoritative advice that it is appropriate to do so. This PAS will be reviewed at intervals not exceeding two years, and any amendments arising from the review will be published as an amended PAS and publicized in Update Standards.

This PAS is not to be regarded as a British Standard. It will be withdrawn upon publication of its content in, or as, a British Standard.

The PAS process enables a specification to be rapidly developed in order to fulfil an immediate need in industry. A PAS can be considered for further development as a British Standard, or constitute part of the UK input into the development of a European or International Standard.

Use of this document

As a guide, this PAS takes the form of guidance and recommendation. It should not be quoted as if it were a specification or a code of practice and claims of compliance cannot be made to it.

Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is "should".

Commentary, explanation and general informative material is presented in italic type, and does not constitute a normative element. The word "may" is used to express permissibility and the word "can" is used to express possibility, e.g. a consequence of an action or an event.

Spelling conforms to The Shorter Oxford English Dictionary. If a word has more than one spelling, the first spelling in the dictionary is used.

Contractual and legal considerations

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

Compliance with a British Standard cannot confer immunity from legal obligations.

0 Introduction

The costs of the sales function are constantly under scrutiny. Many organizations now conduct sales activities which might previously have taken place at a customer's premises, over the telephone. Besides the cost advantage, with customers having less time for discussion with suppliers, inside sales can offer more convenience to customers.

This PAS is a guide intended for use by leaders of the business development function within organizations that have or are planning, inside sales, or telesales as they are otherwise known.

When considering the deployment of telesales, most organizations examine whether to deploy their own staff (insourcing), or to outsource. This is a major decision which is based on a range of multiple criteria such as relative costs, access to skills, flexibility of options, reputational risk, availability of internal staff or external suppliers, and the organization's ability to manage inside sales operations. The decision whether to insource or to outsource needs to be also examined from a range of managerial perspectives. Another consideration is the degree to which the sales process can be managed online. For example, for frequent re-orders, customers may prefer to have access to a customised portal.

The context of this guide is inside sales, which implies telesales managed in-house. Its guidance might also be relevant to organizations who manage telesales activities on behalf of clients. This PAS provides a methodology for corporate sales organizations to efficiently plan, execute and control inside sales activities (ISAs), as part of a wider inside sales management (ISM) strategy to help achieve sales revenue and growth objectives.

It is important that individuals within organizations, who are responsible for achieving or supporting sales-related business objectives, understand methods for implementing ISM, including:

• introducing ISAs effectively at the appropriate stage of the sales process;

• planning ISAs appropriate for achieving sales targets;

• building a sustainable system to understand, analyse and implement improvements to ISAs;

• training relevant employees to effectively implement ISAs, within an ISM environment.

Sales processes in each organization vary depending on industry sector, size of organization, attributes of customers, characteristics of products and services, and the depth of relationships with customers. In order to efficiently achieve sales targets, it is extremely important to have a clear view of these sales processes, and to position optimal business resources to execute them. Activities within sales processes vary based on the status of relationships with customers and the stage of business negotiation with them.

It is likely that each organization has a different configuration of activities within the sales process which do not require physical customer meetings and may therefore constitute ISM. Using inside sales to effectively build relationships, understand customer issues and implement follow-ups can be a more efficient way to manage relationships with multiple customers. Accordingly, ISM offers potential to reduce costs. ISM also incorporates the building and maintenance of good business relationships with customers. However, the primary goal considered in this document is the role of ISM in achieving sales revenue and growth objectives.

The fit of ISM within the organization's business strategies and competitive environment needs to be carefully considered and it is important that ISM is carefully positioned within the overall sales process. The procedures and the elements for considering these are described in detail in Clause **5**.

Within ISM, it is essential that ISAs:

• are properly positioned;

• have defined functionality;

• are flexible;

• are designed to achieve the organization's business objectives;

• are designed to deliver benefits (such as convenience) for customers.

A systematic approach based on the PDCA (Plan-Do-Check-Act) cycle is helpful when implementing ISM and analysing the results of ISAs. PDCA, also known as the Deming cycle, is a simple project management model designed to ensure the efficient operation of functions. For the purpose of this document, *check* encompasses analysis, and *act* describes the adjustment of plans.

The core purpose of this PAS is to discuss methods for establishing ISM as a practical capability. Tracking the progress of sales activities, their results and issues, etc., is important to the overall success of ISM. An information system is needed for ISAs that differs from those used to monitor traditional sales meetings, but that also links into the overall sales process. Information systems and infrastructure features beneficial for establishing ISM are discussed in all parts of the document.

This document is organized in the following way:

• Clause **3** Process map (for sales overall).

• Clause **5** (Plan) explains the planning necessary prior to implementing an inside sales function. It covers:

 – concept development (includes objectives, scope and positioning);

 – System design (processes; people and skills; information systems); and

 – Design of performance indicators.

• Clause **6** (Do) provides detailed guidance about ISM operations, including:

 – operational planning;

 – activities and tasks;

 – operational support (e.g. scenarios);

 – operational management analysis; and

 – implementing improvements.

• Clause **7** addresses checking and analysing (Check) of the cycle.

• Clause **8** proposes improvement measures (Act).

• Clause **9** discusses information systems and data views.

• Clause **10** provides guidance about training and developing inside sales staff.

• The annexes provide peripheral information, supporting the implementation of ISM.

This page deliberately left blank

1 Scope

This PAS provides guidance on the design and implementation of inside sales management (ISM) including all relevant inside sales activities (ISAs), as part of an overall sales strategy.

This includes selling through the use of all methods for communication at a distance, including:

• telephone (inbound and outbound);

• internet chat (inbound and outbound);

• video conferencing;

• web-based software.

It is applicable to all sizes of organization operating in business-to-business sectors in all industries. It is intended for use by senior managers, especially those responsible for sales strategy.

This PAS does not address management of field sales activities (i.e. face-to-face meetings with customers).

2 Abbreviations, terms and definitions

For the purposes of this PAS, the following abbreviations, terms and definitions apply.

2.1 Abbreviations

ISA   inside sales activity(ies)

ISM   inside sales management

ISR   inside sales representative

PDCA plan, do, check, act (cycle)

ROC   reason of call

2.2 Terms and definitions

2.2.1 account management

maintaining positive relationships with existing customers, leading to the generation of repeat business and extending share of wallet

NOTE Usually, account management involves face-to-face meetings with customers and an account manager is therefore usually a face-to-face sales role. However, inside sales organisations can undertake some account management tasks, such as reminders about regular orders, providing information about product upgrades, etc., or be wholly responsible for managing relationships with customers who are small businesses or who do not order very often. Some inside sales organisations have two functions, one focused on the conversion of prospects to customers and another focused on desk-based account management activities.

2.2.2 action plan

individual plan for ISR to achieve specific business objectives

NOTE might also be referred to as execution plan, implementation plan or call plan.

2.2.3 call plan

information to assist ISRs in the preparation and undertaking of telecommunication with potential customers and the achievement of predetermined objectives

NOTE This might also be referred to as reason for call (RFC). The use of a script to be followed without deviation is not recommended.

2.2.4 campaign

sustained and organized programme of activities to generate customer interest in a product, service or special offer

NOTE Usually, this would include marketing activity.

2.2.5 face-to-face sales (or field sales)

sales activities relying upon interaction between seller and buyer where there is a physical meeting

2.2.6 funnel

NOTE also referred to as a 'pipeline'

aggregation of sales opportunities generated by sales activities

2.2.7 inbound sales

incoming phone/e-mail enquiries from customers

NOTE These enquiries may have been stimulated by marketing campaigns.

2.2.8 inside sales activity (ISA)

activity intended to result in the sale of products and/ or services using a method for communication at a distance i.e. not-face-to-face with the purchaser

NOTE 1 This is also known as telesales.

NOTE 2 Inside sales activity is not equivalent to telemarketing.

2.2.9 inside sales manager

individual with overall responsibility for ISAs (see **2.2.8**) and the ISRs (see **2.2.11**) that undertake it

2.2.10 inside sales management (ISM)

management of ISAs (see **2.2.8**)

2.2.11 inside sales representative (ISR)

individual responsible for undertaking inside sales activities

NOTE In some organizations, the role of ISR is split between business development and account managers.

2.2.12 internal referral

act of passing a sales opportunity generated or fostered by ISR to other sales activity, particularly face-to-face sales (see **2.2.5**)

2.2.13 leads/lead generation

indication that a sales opportunity could exist, stimulating ISAs or other selling activity relationship with a decision maker in the customer organization

2.2.14 outbound sales

contact with customers initiated by an ISR, to establish interest in a product or service

2.2.15 partner/channel partner

third party within a supply chain who offers services to both the selling organization and the customer.

NOTE Channel partners include distributors, value added resellers, retailers, franchisees and sales agents.

2.2.16 sales strategy

matching of sales resources to sales opportunities

2.2.17 unique selling point (USP)

factor which a company believes distinguishes its offer from that of competitors.

NOTE It may be a product feature, a quality standard, level of service, price point or brand value.
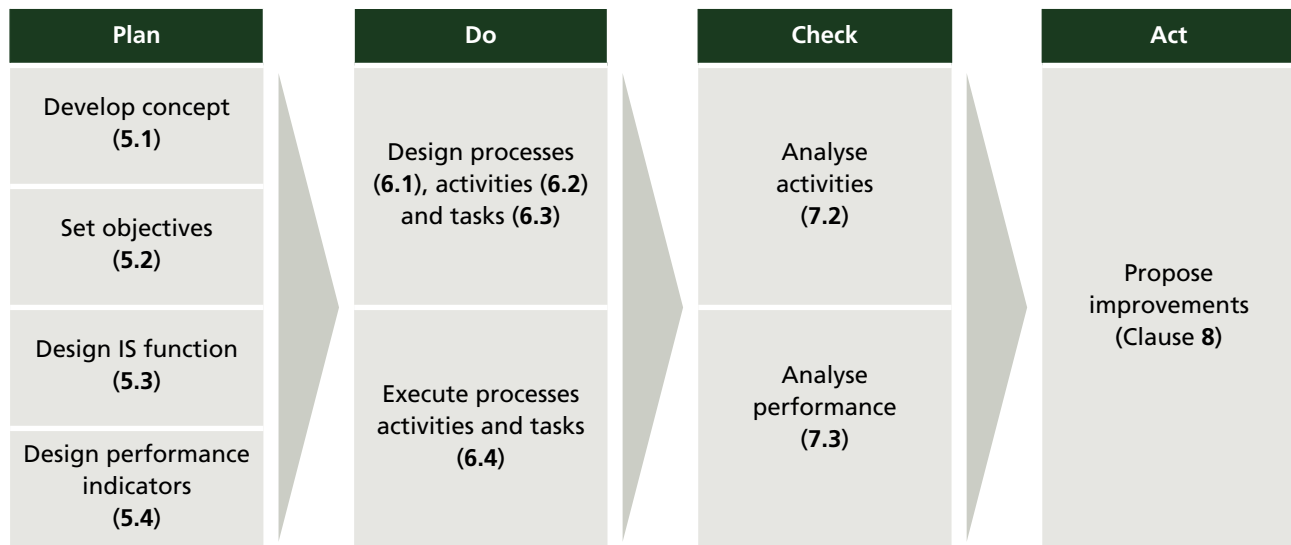
3 Process map

Reference is made throughout this document to the overall sales process. Organizations, according to their business profile, may have different stages in their sales process. The sales process should be mapped to stages in the customer's buying decision making process. A simplified general model for stages in a sales process is outlined in Table 1. Table 2 provides further explanation of the management cycle of ISM.

Table 1 – Process map

Common terminology	Lead generation	Lead qualification	Negotiation	Contract agreement (sometimes referred to as closing)	Post-sales support
Stage in buying decision making process	Buyer is seeking information	Buyer has identified need and the budget required for the purchase and obtained authority to purchase	Buyer establishes which supplier offers the best value	Buyer concludes a legally-binding agreement with one supplier	Buyer is evaluating the success of the purchase
Stage of business development	Suspect (i.e. there is a possibility of future business)	Prospect (i.e. the probability of future business has been confirmed)	Potential (i.e. contact has moved forward with procurement processes required to order product)	Customer	Client or account
Relevance to inside sales	Generally managed by marketing, but incoming enquiries in response to marketing campaigns are often handled by inside sales representatives, or inside sales representatives may be required to cold call targets or customers.	This is a key step at which the ISR also has to evaluate whether the customers' needs can be fulfilled by its capabilities at an acceptable price to the customer.	In larger transactions, this stage is likely to be managed by field sales or account managers. In smaller sales, discussions about the value proposition can be conducted by inside sales.	In larger transactions, this stage is often managed by field sales or account managers. In smaller sales, discussions about contract completion can be conducted by inside sales.	Post-sale, there are considerable risks for the supplier to manage. Continuing communications with the customer are vital to ensuring that the business relationship can be developed.
Terminology in this document	Lead management		Business opportunity management		Customer relationship management

NOTE For further information, see also Table A.1 – Prioritisation data

Table 2 – Management cycle of ISM (guide to contents of this PAS)

Plan	Do	Check	Act
Develop concept (**5.1**)	Design processes (**6.1**), activities (**6.2**) and tasks (**6.3**)	Analyse activities (**7.2**)	Propose improvements (Clause **8**)
Set objectives (**5.2**)			
Design IS function (**5.3**)	Execute processes activities and tasks (**6.4**)	Analyse performance (**7.3**)	
Design performance indicators (**5.4**)			

NOTE *The above is an iterative cycle.*

4 Regulation

Contacting businesses by telephone is subject to government regulation in many countries. Sales managers should be aware of the relevant legislation in their location. In particular, sales managers should be aware of the provisions for permission to contact. For example, in the UK, organisations can register with the telecommunications regulator that they are not willing to receive speculative or cold calls from potential suppliers. Making telephone contact with firms registered on the telecommunications regulator's list can result in a heavy fine.

Storing data about organizations and individual decision-makers in organizations may also be subject to legislation for security and privacy purposes. Breaches of data protection regulations can be subject to financial and other penalties. Organizations are also expected to protect data about customers and other stakeholders held on their systems. Attempts by criminals to steal data should be anticipated, and robust security measures should be deployed and regularly updated.

5 Pre-implementation planning for inside sales (PLAN)

5.1 Concept development

At the concept design phase, the objectives and function of 'inside selling activities' should be established by reference to:

• the organization's overall business strategy;

• organizational structure for business development activities;

• brand values and reputation;

• market segmentation, (see Annex A);

• wider sales strategy;

• the roles of account managers, ISRs and inside sales manager organization (see **5.3.2**)

• appropriate technology (see **5.3.4**);

• skills development challenges (see **10.3**);

• customer benefit.

It should be decided whether to use inside sales as a part of the marketing department or as a part of the sales department at the concept design phase. Strategies will differ from organization to organization. Usually, lead generation and lead qualification are expected to be part of a marketing department, but this may depend on type of industry. In any event, marketing and sales are functions that are both responsible for delivering revenue, growth and customer relationship-based objectives, and it is desirable for marketing and sales processes to be integrated.

5.2 Objectives of using inside sales

5.2.1 General

To help define the reasons for introducing ISAs into the organization's current sales activities, it is essential to answer these questions:

a) What is the objective of inside sales within the sales strategy?

b) What sales functions will inside sales assume?

5.2.2 Sales objectives

Normally, there are the following three underlying principles for sales objectives. The inside sales objective should be clearly aligned with these, as well as with the organization's overall sales strategies. An objective need not be limited to only one of these specific principles.

- growing: obtaining orders from targeted customers who have not previously bought anything from the company;
- maintaining: maintaining agreements with or obtaining repeat orders from customers who have a current relationship with the company;
- expanding share: obtaining orders that expand the scope of business with current customers.

5.2.3 Scope of application of inside sales

In defining the nature and scope of the inside sales function the following should be taken into consideration:

a) the nature of the organization's business;

b) your organization's existing sales processes;

c) segmentation of the markets to be targeted;

d) intended relationship between inside sales and other marketing and sales functions, including promotional campaigns and use of external sales channels;

e) availability of skills and technology;

f) stakeholder expectations for quality and performance;

g) usage of sales tools such as customer/deal databases.

5.3 Designing the inside sales function

5.3.1 Inside sales functions and processes

In corporate sales, customers or partners have to buy something to enable a supplier to meet their sales revenue targets. Functions and processes can be defined as follows.

- lead management, this function generates and develops leads with the objective of increasing the number of business opportunities; encompassing the processes:
  - lead identification, (if relevant to inside sales in a given organization), which involves the gathering of information about a prospective customer;
  - lead qualification, which ascertains whether contact has been established with a relevant buying decision-maker who has authority and budget.

- business opportunity management: this function covers the negotiation and closing of business with prospective or existing customers, with the objective of increasing sales; encompassing the processes:
  - negotiation, which involves proposing solutions for problems and negotiating value;
  - closing, which involves conclusion of contract terms.
- customer relationship management (CRM): this function develops and strengthens relationships with customers, with the objective of increasing customer lifetime value and customer wallet share; encompassing the process of:
  - relationship development, which involves gaining deeper understanding of the customer or client, providing support and creating favourable conditions for future business.
- partner relationship management: this function develops and strengthens relationships with channel partners, with the objective of increasing sales through partners, and improving loyalty. Although some activities are similar to CRM, the context is significantly different. This function encompasses the processes:
  - enablement, which involves identifying key contacts and developing their capabilities;
  - selling support, which involves helping the partner to generate business opportunities and progress them to completion.

The processes necessary for effective sales performance may vary, depending on the products handled and the business size and type. It is recommended that any undefined sales process should be defined before considering ISM. Customer purchasing processes can be used as a starting point. When inside sales are introduced without a defined sales process, duplications, omissions or oversights can occur, causing inefficiency and potential tension between inside sales and other interfacing functions such as face-to-face sales and marketing.

Each process needs to be broken down further for operational management to be efficient. A breakdown of these processes is exemplified in Table 3.

Table 3 – Breaking down processes

Process x							
Sub-process A			Sub-process B				
Activity 1	Activity 2	Activity 3	Activity 1	Activity 2	Activity 3	Activity 4	
Task i	Task ii	Task i	Task ii	Task i	Task ii	Task i	Task ii	Task i	Task ii	Task i	Task ii	Task i	Task ii

5.3.2 Organizational design

The line reporting responsibility of the inside sales manager will vary per organization. Some may report directly into sales or to a chief customer officer who manages all business development functions. The larger the operation, the greater the need for IS managers with teams of ISRs. It may be desirable to have a dedicated trainer, planner and information systems technician in the inside sales department.

Detailed discussion of recruitment, training and development of inside sales managers and representatives can be found in Clause **10**.

5.3.3 Calculating number of ISR needed

Each organization should establish methods to calculate the number of staff needed for ISAs, depending on their context and design criteria already discussed. The following calculation methods are typical:

a) output-driven, e.g. calculations based on expected sales targets:

calculate the necessary performance by calculating back from the sales targets. Calculate the activities indicators (number of valid conversations, number of obtained permissions, total number of calls, etc.) needed to achieve the performance level.

b) input-driven, e.g. calculations based on target market segment scale:

calculate the number of staff required to cover the number of organizations in confirmed target market segments.

5.3.4 Information systems design

As with other aspects of an organization's workload, an information system should be established to support the introduction and operation of ISM. An information system dedicated solely to ISM is not necessarily required, but it is important that each inside sales process is supported. Linking IS processes together with associated processes in marketing, face-to-face sales and customer service can improve the efficiency of ISAs and, therefore, contribute to reducing the workload

of inside sales staff, inside sales managers and ISRs. It is desirable for all customer-facing functions to be working smoothly in combination.

The ISM team might be restricted in the influence they can have on the information system design, depending on the size of the organisation. They should however look to ensure that the information system works for the purposes of the ISR job role where possible.

NOTE Smaller businesses might find it easier to incorporate systems to meet their specific requirements.

Detailed discussion of information systems and data views can be found in Clause **9**.

5.4 Design of performance indicators

5.4.1 Expected performance of inside sales

Define performance measures at a strategic level. These should include:

a) return on investment (ROI) to establish the financial benefit from the investment made in ISA;

b) quantitative measures such as revenue per head, sales funnel ratios;

c) qualitative measures such as customer satisfaction and loyalty.

In some cases, care should be taken to define an appropriate period of time between the operation of inside sales activities and the expected effect, so that performance measures can be collected efficiently and be informative.

NOTE For example, calculate the length of time that a customer needs to reflect on their buying experience before they can comment on satisfaction. Asking for feedback too soon may result in inaccurate replies or refusal to reply.

5.4.2 Staged targets

ISM makes a contribution to the sales funnel (or pipeline) of the business. The funnel contains business opportunities and the stage to which they have been developed.

Define the stages needed to achieve inside sales control targets to make it possible to prioritize activities based on each stage. The steps for defining these stages are outlined in points a) to c).

a) define management targets: targets are usually set per stage in the overall sales process. The outcome of this target setting is to monitor the sales funnel, to ensure that sufficient opportunities are available to develop into closed sales;

   NOTE *For example, 100 suspects might be expected to convert to 70 prospects which might be expected to convert to 40 potentials and 20 customers.*

b) define stages: define the status of the final product for each management target. Consistency with the ranges of conditions defined by the stages and detailed processes should be maintained;

   NOTE *For example, some stage definitions are shown in Table 4.*

c) define the range of conditions per target. Ideally targets should be aligned with outcomes from processes, so these may be concurrent with the success criteria per process described above. The following three methods may be used to establish evaluation criteria to confirm the stages:

   1) Evaluate with a fixed standard or higher for specific evaluation criteria;

   2) Apply a score to levels of evaluation criteria, and evaluate across a set score;

   3) Evaluate by integrating two of the above.

5.4.3 Setting up key performance indicators

Management indices should be set for the duration of the PDCA cycle to measure inside sales performances. For measurement purposes it may be desirable for the inside sales department to be able to monitor its own sub-section of the sales funnel. A calculation is needed to determine the optimum capacity for the funnel, given time constraints, targets and further growth requirements.

Setting up performance indicators makes it easier to identify problems, and this supports the rapid implementation of strategy. The following should be considered in identifying the relationship between indicators:

a) sales target: the indicator that should be reached at the end of all processes;

b) key performance indicators (KPI): KPIs are measures related to particular processes. The achievement of KPIs would be expected to lead to the achievement of targets;

c) leading indicators: measurable factors that precede the achievement of KPIs and act as predictors that a sales activity is on track to achieve KPIs;

d) lagging indicators: measurable factors that occur after the achievement of KPIs, i.e. consequences of achieving KPIs which may have an impact on future activity;

e) activity management indicators: measures of the quality and quantity of activity;

f) assumption list: information about presumed conditions in planning and setting KPIs;

g) setting the target/actual.

A path analysis for these indicators should be built to monitor cause and effect in inside sales performance.

Table 4 – Possible stage definitions

Customer Relationship Depth level	Customer Engagement Level		
	Suspect	**Prospect**	**Potential**
Stage 1	Can identify a suitable contact	Contact has been established with the correct decision-maker	Can collect detailed information from the customer, sufficient to prepare a proposal
Stage 2	Can obtain permission to contact	Decision-maker has confirmed need for product	Contact has moved forward with procurement processes required to order product
Stage 3	Can identify the potential for product need in the organisation	Decision-maker has confirmed authority to buy	Budget approval and timing confirmed
Stage 4		Decision-maker has confirmed budget available	Schedule of discussions about pricing and terms in place

5.4.4 Make provision for the evaluation of cost efficiency

5.4.4.1 General

The organization should establish a method for evaluating the overall cost efficiency of inside sales.

5.4.4.2 Evaluation axes

The following should be used for the evaluation axes for both returns and costs:

a) time axis – time axis of implementation (year, quarter, month);

b) human resource axis – by ISR and by team;

c) task axis – items completed in line with outcomes and objectives.

Because multiple workers implement multiple tasks in a specific time frame, management of the task axis is complex. To handle this, the axis could be managed so that it is possible to ascertain returns (activity results) and costs (human resources assigned) for each individual task. However, the overhead of measuring this degree of detail should be considered. The costs of measurement should not exceed the benefit derived from the information.

5.4.5 Making provision for the evaluation of cost efficiency of ISAs (ROI)

5.4.5.1 General

The cost efficiency of ISAs should be anticipated in the planning stage, and measured periodically thereafter to check that expectations are fulfilled. Many companies access some type of benchmarking such as comparisons with best practice companies via professional associations or through research obtained from industry analysts or through seeking quotations from companies offering outsourced telesales. However, benchmarking can be costly, especially if comparisons need to be made on a regular basis. Where a company has a variety of sales and marketing activities conducted across different channels, it is informative to compare the cost–productivity ratio of ISAs to the cost–productivity ratio of the same activities when other sales resources are utilized.

5.4.5.2 Evaluation by comparison between channels

An example of this would be comparing the value of business opportunities generated by ISAs divided by the costs of ISAs over a fixed period of time, to the value of business opportunities generated by marketing activities divided by marketing costs over the same period.

Care should be taken to ensure that comparisons are valid. Within one company, particular product lines are managed by different channels because market characteristics require different sales processes. Customer behaviour may be different, sales cycles may have different timescales, etc.

5.4.5.3 Evaluation by comparing the primary costs of activities

Hypothetical ROI comparisons may be made where a state of play before inside sales was introduced can be extrapolated to the present day.

If ISAs had not been introduced, one possible scenario is that those activities would have been undertaken by face-to-face sales staff. Figure 1 illustrates this point.

Figure 1 – Substitution of inside sales activities staff with other sales staff
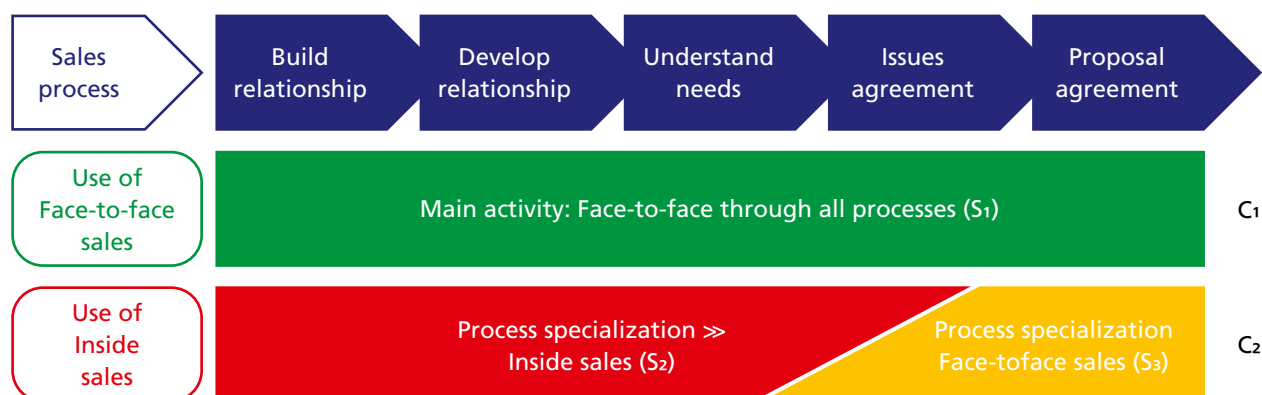
Cost efficiency can be calculated using the following formulas, where C_1 is face-to-face sales and C_2 inside sales formulas (1) and (2).

- $C_1 = S_1$
- $C_2 = S_2 + S_3$

If the performances generated by process C_1 and process C_2 are the same, cost efficiency is higher for the lower of the cost-productivity.

As the processes assumed by inside sales expand, in formula (2), the total costs (C_2) will lower, as the face-to-face sales resources, which are relatively higher in cost, are substituted. In other words, a combination of activities is preferred. Conversely, however, that does not necessarily lead to maximizing performance. Comparative productivity could be compared on a process by process or activity by activity basis and built up to a functional comparison. In the sales function, it is not always feasible to make comparisons between channels on the assumption that organizations can change their business model. There may be instances where ISAs are not utilized because of the targeted customer attributes.

It is important that metrics are applied to inside sales. However, metrics should be analyzed in context by informed decision-makers before adjustments are determined.

6 ISM operations (DO)

6.1 Inside sales function – Detailed design

An effective and efficient inside sales structure should be built that is compatible with the organization's business model.

6.2 Detailed process design

Steps a) to d) should be used to define in detail the processes to be undertaken by inside sales.

a) confirm processes: check which processes are to be undertaken by inside sales;

b) define the processes in detail;

NOTE *For example, in the process lead qualification, the following sub-processes might be defined:*

a) *qualification of the contact's need for this product/service;*

b) *confirmation of the contact's authority to buy for this category of product/service;*

c) *confirmation that budget is available for this potential purchase.*

c) define the range of conditions of success for each process. For example, conditions for success could be items of information obtained from the target customer. The evaluation criteria should be defined;

NOTE *The following are examples of evaluation criteria for each sub-process:*

a) *lead identification: permission to contact checked, names of contacts, location, roles in their organization, awareness of our organization, etc.;*

b) *lead qualification: scope of work established, contact has product purchasing authority, scheduled purchasing period, competitor activity, etc.;*

c) *negotiation: customer's responses to proposals, counter-proposals, and additional decision-makers identified, etc.;*

d) *closing: Terms agreed and customer's confirmation of acceptance.*

It is important to be able to evaluate conditions for success objectively, so that ISRs can be confident of their progress. Ambiguity can lead to errors in the continuation of the process, disputes and demoralisation.

d) define the activities: define the activities that satisfy the range of success conditions in each process. Each process is an aggregate of several activities. For example, the following activities should be undertaken within lead identification:

1) establishing contact: based on the information about the key decision-maker to be targeted, call the organisation and try to establish contact, noting conversations with secretaries and messages left;

2) building a profile: collect information about the individual, such as their title and location (see **9.2.3**);

3) promoting your organization: explain your organization's strengths to the contact to build their awareness;

4) confirming their objective: obtain permission to continue providing sales activities to the contact, and confirm the means to do so.

The organization should set targets per activity. For examples of activity design, see Annex B.

6.3 Conversion of ISAs into individual daily tasks

6.3.1 Individual action programmes

Action programmes should be formulated per individual ISR to ensure that strategies are implemented. These plans should include:

a) activity objectives and targets;

b) targeted companies or customers;

c) product/service mix;

d) timescale;

e) offers for the targeted customers;

f) approaches and call plans.

The inside sales manager should outline action plans for individuals. They should also outline the conditions necessary for achieving expected results using management indices.

Sales and management targets should be determined in light of a broad consideration of the history of activities for targeted customers to date, and the organization's strengths and weaknesses.

Customers targeted per individual should be determined from customer segments prescribed as targets, and then prioritised. The degree of progress an ISR can make might be affected by the volume of information about the targeted customer provided by marketing, and by the customer's previous experience of dealing with the organization. Another consideration is the type of offer being made to the targeted customers. A special price offer on regularly bought items may be considerably more attractive to some customers than introduction of a new product.

All messages to targeted customers should send a consistent image of the organization's brand and provide clear pathways for mutual value (sometimes known as the call to action). Activity implementation periods and associated measures should be appropriate to the type of offer and the type of targeted customers. The possibility of building and maintaining close customer relationships through ISAs depends on good timing of offers/proposals in line with the customer's time frame for resolving specific problems in their particular circumstances.

6.3.2 Defining call plans

A call plan is a pre-planned flow of conversation with a targeted customer, formulated with the purpose of efficiently achieving the objectives of the sales activity, also known as a call plan. A call plan should provide direction and purpose for a conversion with a targeted customer. It should go through pre-ordered steps that strive to attain the objective of predetermined individual tasks.

NOTE For example, the following steps might be considered when the objective is to convert a prospect to a potential:

a) *establish rapport;*

b) *check their current situation (information from company reports or recent media publicity);*

c) *understand their objectives and needs;*

d) *explore the impact of the needs not being met;*

e) *propose a solution to address the customer needs;*

f) *establish what next steps are needed for negotiations to take place.*

Call plans, which are an indispensable element of ISAs, should be constructed with an explicit awareness of their desired outcomes for the ISR and the customer. It is necessary for the marketers who compose the scenarios to be able to anticipate the needs that particular targeted customers will have, and they should be sure that the proposal to be offered meets those needs in a better way than competitors. In short, the unique selling point or point of differentiation should be clear. Points of direct comparison with

competitor products are needed. The scenario should also be clear about the call to action for the customer, so that the opportunity can progress to the next stage.

6.3.3 Communication response

A call plan cannot account for the variety of responses that a customer might have to the questions put to them by the ISR. The customer will almost certainly want to ask some questions of their own. These are often referred to as objections, but they should not be ignored or disputed. The targeted customer would wish to minimise their level of risk in any purchase, and the ISR should be sensitive to their concerns. Communications planning should anticipate questions that a targeted customer might have and provide relevant information that the ISR may need to reassure them. This information might include detailed benefits of the products, examples of how they can be used, total cost of ownership to the customer over time, etc. To aid communication with customers, ISRs should:

a) list obtained information:
Pauses in the flow of conversation with the targeted customer should be natural. One-directional, forced conversations are not appropriate to ascertain latent issues and dig deeper to understand a customer's needs. However, it is important to make some progress in every contact. Obtaining additional information is an important part of the process, and it should all be recorded and added to the customer profile.

b) provide supplementary material:
As a means for supplementing the spoken information as provided by an ISR, brochures such as product descriptions, emails or related websites should also be available to the customer. These have the advantage of being accessible to target customers at their own time, and of being able to provide information that cannot be conveyed in a short conversation. Supplementary materials should:

- include content that supplements information transmitted by an ISR;

- incorporate central information that is difficult to explain only by conversation, such as examples of how to use a product;

- be consistent with the marketing messages received from other media.

After providing supplementary material, the ISR should check the degree of understanding of the content, ask if there are any questions or unclear points, and address any items of interest or concern for the targeted customer. Feedback on the questions and unclear points should be sent to the marketing function to help improve the material.

6.3.4 Activity management measurement

Activity indicators should be set to measure whether ISRs are implementing an appropriate quantity and quality of ISAs to achieve intended results.

NOTE For example, in order to generate 100 opportunities, nothing will happen without having conversations with buying decision-makers in at least 100 companies. In such a case, implementing conversations with buying decision-makers in 100 companies is an activity indicator.

Different types of indicators can be considered for monitoring activity, such as:

a) indicators of the quantity of ISR activity;

b) indicators of the quality of ISR activity;

c) indicators of the results generated from ISR activity.

These are structured as outlined in Table 5.

The skill level of the ISR, the strength of your organization's brands, the relationship to date with the targets and themes for approach, etc. should be considered to determine to what degree target levels should be set in these management indicators (see Table 6).

Table 5 – Examples of the structure of activity indicators

Indicator type	Purpose	Examples of activity to be set	Examples of indices to set
Quantity of ISR activity	To maintain the number of activities and actions required to generate results.	• Number of daily telephone calls • Average call time	• 60 calls per person per day • 15 minutes per call or 100 minutes per person per day
Results generated from ISR activity	To maintain activities and actions effective in generating required results.	• Number of permissions obtained • Number of important profiles were obtained • Number of organizations whose key person was confirmed	• Number of people with whom successful conversations were held x 60% • Number of permissions obtained x 40% • Number of targets x number of permissions obtained

Table 6 – Determining the levels to be set in activity indicators

Example of activity set	Considerations when setting	Range of sales figure target set
Number of daily telephone calls	Can increase the target if there is already a substantial amount of information about contacts within the targeted customer.	20 to 80 opportunities per person per day
Number of successful daily conversations	Can increase the sales target if your organization's recognition by the targeted customers is already high.	40% to 60% for the number of targeted customers
Average length of call	Shorter calls would be expected where it has been established that there is a close match between the offer and recognized customer issues. However, strong synergy between views of the organization and the client could lead to deeper discussion.	Five to 20 minutes per conversation

Table 7 – Setting performance indicators

Objectives of individual measures	Positioning of inside sales activities	Examples of activity to be set
Developing new customers	Approach to prospects to find the key buying decision maker.	Number of contacts obtained
	Approach to prospects to confirm a key person or to find their successor.	Key person profile;
	Approach to prospects to explore proposal opportunities.	Number of proposal opportunities generated
	Negotiate terms of a proposal.	Number of contracts completed.
Maintaining existing customers	Approach customers to confirm continuation of existing contracts.	Number of continuations
	Approach customers where contacts have changed	Number of new profiles obtained
	Approach customers with a new proposal opportunity.	Number of new proposal opportunities obtained
	Negotiate terms of a proposal.	Number of contracts completed.

6.3.5 Performance indicators

Performance indicators help in understanding the results of ISR sales activities with targeted customers, using multiple measures. Information systems should focus on comparing actual results and the plan. Breaking down indicators into their constituent elements helps to indicate whether the indicators can be raised or should be reduced. If a difference occurs between the actual and the estimated results, it is important to be able to identify what kinds of improvements are necessary in which ISAs. Performance indicators are set for both individuals and activities (see Table 7).

A value should be set for each performance indicator. There are many contextual variations that should be taken into account, such as the attractiveness of the organization's brand, the type of merchandise, the relationship with the targeted customer to date, and if special offers are available. Experience should be accumulated in light of analyses of the results of repeated implementation of your organization's ISAs. It is important to reference other examples of the same activities that have been implemented in the past when setting targets, so that the rationale for the target is clear.

6.4 Inside sales operations

6.4.1 Defining operational rules

Each of the following points should be considered when defining operational rules for individual tasks.

a) The results of the implementation of ISAs should be shared quickly.

b) If a situation arises that should be handled by sales or the inside sales manager, it should be reported quickly.

c) For ISR activities to develop, the necessary improvement measures should be analyzed and studied.

d) Determining or changing important activities for individual measures, such as KPIs and scenarios, should be approved and shared.

Any individual, sales person or manager who can be affected by the results of ISAs should be able to access operational rules. The possibility of ISAs fulfilling their objectives for the organization is increased by specifying clear operational rules.

An operating model should be designed to enable the smooth operation of ISAs, consistent with the wider operations model of the organization. The scope of the design should include links with other departments related to inside sales. The steps for defining this design are outlined below

Task content definitions:

1) Each ISA can be broken down in to tasks. Depending on the organization's context and the level of skills of staff, care should be taken not to over-automate processes.

2) Define the content of the task, the input necessary for the task and the output as a result of the execution of the task.

3) Determine the frequency and the timing for executing each task.

Role definitions:

i) Define each role and responsibility (R&R) to execute tasks.

ii) Set R&R, clearly defining the scope of the R&R and assigning tasks. If necessary, this includes related departments.

6.4.2 Daily management of inside sales activities

6.4.2.1 General

This clause provides the essential points and policies for properly managing ISAs and their results. Depending on the activities to be managed, it should be understood that the frequency and the destinations for result reports will differ.

6.4.2.2 Preparing for the approach

Preparing for the approach to the customer or prospect should be as effective and efficient as possible. The content of preparations differs according to the objective and the flow of the call. Understand and prepare accurate information according to the flow of the call (see Table 8).

6.4.2.3 Daily activities

Setting targets as milestones on the way to final targets, within a specific time frame, can lead to more confidence that the ISR is on the right path to achieving targets. Action plans that cover one day, which is the smallest unit for the activities cycle (planning, executing, reporting and sharing, and timing of activities) are useful for the ISR as a rhythm of business (ROB) method. This makes the activities more effective by setting a fixed pattern for one day's actions. ROB can be incorporated as a routine, such as preparation time before a call, call time, post-call processing and review or escalation time. ISRs should be provided with a stable ROB to optimize performance.

Table 8 – Example of content to prepare before approaches, by call objective

Objective of call	Content of preparation before approach
Developing prospects	• Understand the targeted customer's organization (type of business, location, number of employees, recent sales and recent trends, recent profits and trends, etc.) • Business model of targeted customer • Call plan
Following up with prospects (e.g. courtesy calls after decision-maker has attended a seminar)	• Overview of conducting seminars (date and time, sponsors, main theme) • Content of seminar (themes of lectures, lecturers, distributed materials) • Targeted customer information (visitors, results of questionnaire responses, history of activities to date) • Call plan
Maintaining existing customers; furthering relationships with existing customers	• History of activities such as mailings and sales calls • Past purchasing history, requests or complaints • Call plan

When making weekly or monthly plans, the following elements should be considered:

a) vacations or any other non-working hours;

b) meetings;

c) training;

d) ISR's level of self-motivation (such as eagerness to achieve targets).

Training time to improve fundamental practical skills is an important allowance, as it contributes to the ISR's effectiveness.

Contingency time should be considered for events that cannot be anticipated. Examples might be: a personal issue arising suddenly, such as a call from the ISR's children's school; a customer issue that need immediate action, such as a sudden need to delay a contract due to a flood at their premises. Inside sales work can be stressful, so care should be taken to set realistic activity plans to avoid burnout and high staff turnover.

Many ISAs are work that is continuous. The content of activities set should be adjusted as each activity develops. Data should be kept to enable the tracking of variations in activities over time that deliver more or less success, so that activities can be updated and enhanced.

6.4.2.4 Target list confirmation

The targets set for ISRs should be easy to confirm, and details should be verified. It is preferred that the daily format is not simply a case of lists of names of organizations that marketing has decided to target. The list might be prioritized according to criteria such as size of opportunity or quality of relationship. To promote greater ISR productivity, the ISR should be provided with an information system that allows an easy assessment of targets that should have an activity on that day.

NOTE When checking the detailed information for each target, it is desirable to access all information as succinctly as possible, e.g. on one screen. If it is necessary to reference information from multiple screens, efficiency will suffer.

6.4.2.5 Activity result registration

ISRs should accumulate the results of activities implemented for individual targets. When accumulating information, consider how the accumulated and stored information might be utilized in the future. Leaving information on multiple screens is considered to have a negative effect on ISR productivity in consideration of using the information later. For that reason, an information system that easily registers activity results should be implemented.

6.4.2.6 Activity outcome

In order to manage ISAs, the outcomes of activities (see Table 9) should be recorded. It is also important to think of the result of the activity separate from the current state of the lead.

Table 9 – Activity management definitions

Management class	Status class	Definition
Valid	Established	Conversations with target individual have been established.
	Rejected	Conversations rejected by target individual.
Undelivered	Rejected before contact	Operator or secretary rejected call. No contact made with target individual.
	Absent or busy	Conversations not possible because the target individual is absent or busy.
	Disconnected	Unable to reach target due to technical problems.
Not started	Pending	Cannot judge whether activity should be implemented.
	Not implemented	Activity not implemented.

6.4.2.7 Call plan confirmation

ISRs undertake sales activities according to the call plan. The key points of the content should be learned in advance to increase the quality of the discussion. Call plans should be stored in the sales organization's information system and be accessible during an activity.

6.4.2.8 Internal referral

Activities implemented by ISRs cannot always be concluded by them. They are escalated to someone else when necessary. Escalation of a case is multifaceted. It includes handing it off to another sales person, sharing customer claims with the sales person, and consulting with an inside sales manager about the content of the activities. These actions should be easily linked, and the results of support easily fed back. Also, sharing the content of such support with other staff, when necessary, is helpful in sharing knowledge of the overall organization.

In an environment where it is necessary for ISRs to decide to whom and how to escalate a case according to the content to be escalated, there is concern that the work could become overcomplicated, which would cause productivity to suffer. For that reason, this process should be managed in a uniform format and a system provided that will determine where to escalate a case according to the content.

6.4.2.9 Question and answer (Q&A)

A variety of Q&A should be collated about daily ISR activities. By sharing such information, duplication of queries can be avoided and the potential for self-sufficiency of ISRs in resolving issues can be increased. Q&A should be regularly updated. Also, to ensure effective utilization of that data, it should be easy to access and search.

6.4.2.10 Knowledge management

An advantage of ISAs is that direct communication with targeted customers can be conducted in high volume. However, this requires a significant amount of information to be stored and retrieved. In order to increase the productivity of ISAs, define the tools and shared rules that enable the storage and sharing of ISR knowledge and best practices. This can result in information being shared more quickly between ISRs, especially during a conversation with a targeted customer, and therefore increase the effectiveness of the approach.

If there are multiple products and services being promoted, it might be appropriate to assign products to individual ISRs so that they can gain a deep knowledge of the product and how it is used. Having members of the team who are specialists and who can quickly be consulted when another ISR has questions is useful.

6.4.2.11 Managing working hours

Daily management of ISR working hours is necessary to ensure efficient utilization. It is important to consider ISR working hours in relation to activities and tasks, the status of progress against performance indices, and progress to reach indices for individual ISRs.

6.4.2.12 Reporting

Reports on the progress of operations should be generated to enable analysis of daily activity. See Table 10.

Table 10 – Examples of reporting required

Type	Format	Agenda	Timing	Frequency	Participants
Daily report	Report by email	• Report on the day's activity results • Request escalation • List of generated opportunities • List of lead status by customer	Evening	Daily	Person responsible for inside sales Inside sales manager Sales director
Weekly report	Meeting	• Share weekly activity results • KPI index achievement status • Outlook for reaching results • List of lead status by customer • Study of business opportunities' support • Study of measures for issues	Days or hours	Weekly	Person responsible for inside sales Inside sales manager Sales director
Monthly report	Meeting	• Share monthly activity results • KPI index achievement status • Outlook for reaching results • Share analysis results • Study measures to improve issues • Next month's activities' plans, share call scenarios	First working day of the month or days or hours	Monthly	Person responsible for inside sales Inside sales manager Inside sales planner Sales director
Quarterly report	Meeting	• Share that quarter's activity results • KPI index achievement status • Study measures to improve issues • Share next month's promotion plans	First month of the quarter or daily report	Quarterly	Person responsible for inside sales Inside sales manager Inside sales planner Sales director

7 Checking and analysing (CHECK)

7.1 General

When activity indicators are reviewed, the causes of variations from plan should be identified. The fundamental point is to understand the level of progress by reviewing the activities and studying their constituent elements. By examining the shortfall from a variety of perspectives, the root causes of issues can be identified and adjustments made, leading to increased efficiency.

If the indicators suggest performance beyond the targets set, analysis is worthwhile so that targets can be adjusted and strengths can be developed and exploited.

7.2 Analysing activity

Activity indicators should be analysed as follows:

a) By individual ISR
Individually evaluate the ISRs assigned to particular tasks. When there are variations in results between individuals, identify the causes for individuals with low performance and arrange training to improve their performance. If the performance of all ISRs is equally low, assume the cause is in the scenarios, merchandise, etc., more than individual skills, and conduct further cause analysis.

b) By targeted customer levels
When implementing an approach to multiple customer segments, evaluate the approach by the segment attributes (size of organization, type and category of business, region, etc.). When there is an issue in only a specific type of customer, it is necessary to redesign the plan that matches that customer type.

c) By product type
When implementing an approach using multiple pieces of merchandise, evaluate the approach by product type. When an issue occurs only when using a specific product, analyse the issue and redesign the approach to remedy the inconsistency.

If there is a deviation between the activity index target and the results, separate the possible causes for the deviation into internal factors and external factors. Internal factors are causes in the activities themselves, such as inadequate ISR skills which might be insufficient knowledge of the product, insufficient understanding of the customer's business or low communication skills. External factors are causes that affect the results regardless of the activities, such as uncompetitive products and weak market awareness. Track performance over a number of past periods to identify trends, and compare results per ISR.

If a cause cannot be identified, the results should be followed over a fixed period, after making a hypothesis about the possible cause.

In analysing activity management indicators, it should be considered whether an appropriate environment has been provided in which ISRs can make the telephone calls. If not, plans should be implemented to make improvements. There may be the following issues with the working environment:

1) clear and consistent guidance has not been established to enable ISRs to plan activities;

2) working time has not been allocated appropriately;

3) the operational support system is not easy to use.

7.3 Performance analysis

7.3.1 General

When performance indicators are reviewed, the causes of variations between actual and plan should be identified. It is important to be able to link results from individual tasks to their effect on the sales funnel/pipeline of the organization.

ISRs should be involved in analysing their level of progress against performance indicators. In sales, it is generally important to focus on quantitative targets to encourage a competitive spirit among the ISRs and ISR teams to enhance productivity. Disclose the level of progress to the individuals and teams affected, whilst reporting to senior management.

It is also necessary to place importance on qualitative targets. Competition between ISRs should not lead to pursuit of sales targets at the expense of the quality of the interactions with the customers, and relationships with the customers.

The inside sales manager or team leader is primarily the person who checks the quality of calls made by each ISR on a daily basis, by matching the activity records and voice logs in the business support system for all opportunities, per ISR.

Table 11 – Performance indicators and considerations

Performance index	Considerations
Number of business opportunities generated	• Check the transition rates, such as the rate of conversation successes and the profile acquisition rate (number of key people), along with the sales figures totals. There can be many reasons, such as the following, why the number of main profiles to be obtained has not been reached: • the main profile acquisition was not clearly specified in the call plan; • the specification in the call plan did not match the flow of the actual conversation; • the type of response to be received was not defined. Accordingly, and in consideration of these reasons, the call plan should be revised for all opportunities. • When multiple approaches have been repeated from the past, a clear record of what information relating to which key person and profile was obtained each time needs to be maintained. This information should be analysed before adjusting ISR tasks.
Number of confirmed commitments to continue agreement (existing customers)	• Check the reasons for customer continuing or not continuing with the agreement when reviewing the number of conversations. 1-a) Number of conversations less than target → Check the rate of conversions being progressed beyond first communication against all calls made and conduct analysis. 1-b) Number of conversations on or above target → Check the reason for customers continuing or not continuing the agreement. • If there is a big difference between the number of confirmed commitments to continue the agreement and the actual track record of agreements that were concluded, check the confirmation step in the ISR conversation logs, and whether there were any issues in obtaining the agreement.

Plan assumptions and hypotheses should be compared with the actual data when checking the level of progress of the performance indices, in weekly and monthly cycles. See Table 11.

7.3.2 Qualitative feedback

The organization should not only analyse performance management indicators and study improvement measures, but also obtain feedback from customers and from colleagues, including the marketing department and the face-to-face sales department. The objective of a qualitative analysis is to clarify the next actions that should be taken in order to improve the strategy of sales activities, including ISAs, and the message, call plan and materials used.

Feedback information is extremely important for the following reasons:

a) it helps the ISR and inside sales manager to understand the needs and expectations of customers and colleagues in face-to-face sales, regarding ISAs;

b) it can improve the quality of ISR-generated opportunities;

c) it helps to set up the content and themes that are appropriate for the next approach to be implemented by ISRs for targeted customers;

d) It helps ISRs understand the results of their activities with a view to improving them.

The integration of inside sales with face-to-face sales can lead to improved customer satisfaction, and maintaining and improving the motivation of all sales staff. Feedback should enhance the contribution of the inside sales function to achieving sales targets.

Requesting too much feedback can overburden the face-to-face sales team. The method for feedback should minimize the time commitment for them, such as using a checkbox system or selections from a pull-down menu. Periodic meetings between ISRs and face-to-face sales representatives can help in the exchange of informal feedback and development of mutual understanding.

8 Adjustment – Proposing improvement measurements (ACT)

Analyses of activity and performance indicators for the whole inside sales function should be discussed with senior managers, associated functions (such as marketing and face-to-face sales) and the individuals and teams in the inside sales function. Where necessary, improvements should be proposed and implemented.

The following points should be considered when proposing improvement measures:

a) is it clear who is responsible for confirming the need for the improvement plan?

b) are the rationale, timing, process and responsibility for implementing the improvement clear?

c) are criteria set for evaluating the suitability of the content of the improvement?

After executing the improvement measures, it is recommended that improvements are sustained through the PDCA cycle and that performances continue to be improved.

Inside sales managers will also need to make daily and weekly adjustments where activity or performance per ISA or ISR varies from plan. Examples are shown in Table 12 and Table 13.

Table 12 – Examples of activity management adjustment

Activity indicator	Adjustments	Frequency
Number of daily telephone calls	• When targets not met: check together with results management index 1-a) Results management index also below target → Increase number of daily telephone calls. 1-b) Results management index above target → 2) 2) Confirm average talk time. 2-a) Average talk time above expectation → Check whether conversation that led to result was high quality (if so, no problem). 2-b) Average talk time below expectation → Check the rate of conversion from initial communication to further activity (number of successes) → improve call list or train for better conversation technique.	Review: daily, analysis and improvement: weekly
Number of successful daily conversations	• When targets not met: in addition to reviewing the number of telephone calls, add an analysis of targets. 1-a) Number of telephone calls also below target → Improve by increasing number of daily telephone calls. 1-b) Telephone calls above targets → 2) 2) Compare and confirm with other ISRs. 2-a) No difference in targeted customer attributes; no different from other ISRs. → Consider a presumption of differences in set targets. 2-b) No difference in targeted customer attributes; different to other ISRs. → Consider it an individual skills issue of the ISR; improve conversation skills. 2-c) Difference because of targeted customer attributes. → Improve call plan. Also analyse conversation success rate if it suspected that it is being affected by elements that the ISR cannot control, such as your organization's brand, poor information on call lists, etc.	Review: daily, analysis and improvement: weekly

Table 13 – Performance indicators and adjustments

Performance indicator	Adjustments
Number of confirmed commitments to continue agreement (existing customers)	Example 1: (Reason) The ISR has not understood the customer's needs sufficiently, so did not discuss the value of the product in enough depth. (Adjustment) More training on preparation and questioning technique. Example 2: (Reason) Other party's circumstances, such as the branches that used the product have closed. (Adjustment) Change the call plan to obtain sales opportunities for other merchandise handled.

9 Information system and data views

9.1 General

An information system and infrastructure to support business support systems, information management and communication, is critical to the successful implementation of inside sales. If this system is computer-based, the operational support system should be managed using a relational database structure, so that enquiries can be made from a variety of perspectives.

This clause describes some of the information necessary to implement ISAs. It does not necessarily cover everything that is needed to provide a sufficient system in line with the objectives of the ISAs in your organization. To ensure the efficiency of work processes and to achieve improved productivity, prioritize and analyse what information system and infrastructure elements should be introduced.

9.2 Operational support system (ISM system)

9.2.1 General

The purpose of ISM is the development and operation of ISAs that contribute to achieving sales targets. Accordingly, the operational support system should report on the status of ISAs and provide decision support for managers. Results from past ISAs and knowledge gained from them should be shared on the system.

9.2.2 Funnel information

The most important information to confirm whether the ISAs are reaching the target customers and your organization's sales targets is a funnel, also known as pipeline.

The sales funnel brings together important indices for measuring ISAs within particular management periods. Funnel information should support all stages of the PDCA cycle, but in particular funnel information is used to identify where customers are in their buying cycle and which ISAs may need to be deployed to improve results. Information should be available from a number of perspectives, such as by product, by ISR, by team (section and person in charge), and by targeted customer attribute.

Here, visual aids should be used to help intuitively understand situations and transitions. Using graphs and charts etc. facilitates understanding and rapid decision-making.

9.2.3 Lead information

Information about organizations that are not already customers, but have been identified by marketing analysis or activity to have a potential need for your organization's product or services should be stored. Typically, information about the targeted customer would be:

- business name;
- business type and category;
- location of headquarters;
- number of full-time employees;
- number of branches and their locations;
- organizational overview;
- sales and profits;
- if the organization is already a customer;
- trading history with your organization;
- business environment;
- information relating to information systems;
- business plans (budget plans);
- organizational structure, and;
- business issues.

Data should only be held about organizations where there is no legal impediment to telephone contact.

9.2.4 Business opportunity data

Business opportunity data is separate from information about a lead/customer and ISA. Sometimes called case information, a business opportunity is a view of the customer, product and ISA. For example, at a given point in time, product X may be proposed to customer Y using ISA Z (a special price offer). The progress of each opportunity should be tracked through the sales funnel.

9.2.5 Information about ISAs

Accumulate information relating to the implementation of individual ISAs, such as a particular campaign to make a special price offer. Information might include:

• objectives and background;

• performance management indices and their results;

• call plans;

• assignment of activities and tasks;

• any improvement measures and their results;

• any other details of implementation (e.g. dates).

9.2.6 Customer information (organization)

It should be possible to review information associated with a particular customer in a single view. Items to be included in a case view might be:

• organization name;

• name of key contact;

• product;

• business opportunities' size (value, quantity of business opportunities, etc.);

• sales to date;

• introduction or scheduled proposal period;

• background (customer-specific contexts and issues);

• existence of budget steps and scale;

• internal approval processes and status of approvals.

9.2.7 Contact information

Contact data is data regarding a person who works for the targeted customer. One person should be treated as one record. Personal data should be managed by name. If name processing is not implemented properly, it would cause difficulties in re-contacting the person. Data about a contact might include:

• name of the department or subsidiary where the person works;

• positioning of the department/subsidiary within the organization;

• title of contact;

• associated managers/deputies;

• associated staff, e.g. secretary;

• Direct telephone number;

• e-mail address;

• purchasing authority;

• business issues and interests;

• knowledge of your products;

• participation in our events/seminars;

• requests for information.

All contact data should be linked to data about the relevant organization, so that the chain of authority in purchasing processes is clear.

9.2.8 Customer history

This category of information is the history of contact with a customer, also known as an activity log. Contact may have been made by telephone, email or personal visit. Each single contact history should be treated as one data item, even where there is no result (such as individual is absent when telephoned or postal mail is returned), as such information is helpful in deciding whether to target the person for activities in the future. All approach histories to the targeted customer should be easily accessible in the information system, so that a view of the amount of activity with a customer and depth of relationship can be assessed.

Activity information could include:

• name of targeted contact (per approach);

• objective of activities;

• call plan used;

• status of the activities;

• activity results;

• profile results (additional information gained about the customer's needs);

• ISR remarks regarding forecast of the targeted customer becoming a client and ideas for the next actions.

NOTE See Clause 4 for further information on risks connected to storing customer information.

9.2.9 Performance and measures information

Performance tracking is necessary management information. Besides the sales funnel, most organizations will also have a variety of quantitative and qualitative performance measures linked to business objectives. Different views per type of measure are desirable. For example, a view of performance per ISR (such as call activity, sales made, skills level), a view of performance per ISAs (such as sales improvement generated, time deadlines met) or performance per customer (share of spend, satisfaction level).

9.2.10 Peripheral equipment

Generally, the tendency is to believe that ISAs only require a computer terminal and telephone headset. However, in order for ISM to function effectively, more equipment might be needed, see Annex C.

10 Human resource management in ISM

10.1 General

This clause addresses some of the human resource management processes associated with ISRs and inside sales managers. The scope of human resource management described here covers deployment, initial training, skills improvement methods, career development, evaluation, motivation and reward.

10.2 Deployment of ISRs

10.2.1 Employment criteria

The prerequisite capabilities needed for each ISR and inside sales manager should be defined with reference to your organization's objectives for the inside sales function and general employment criteria. Where ISRs are being recruited from outside the organization or from other parts of the organization, exercises such as role-play could be used to ascertain the degree to which the candidates meet the person specification.

10.2.2 ISR responsibilities

It is expected that ISRs should be responsible for the following:

a) understanding laws and ethics of selling;

b) preparing and delivering a sales presentation;

c) handling objections, negotiating and closing sales;

d) understanding influences on buyer behaviour;

e) understanding customer segmentation and profiling;

f) understanding sales and marketing in organisations;

g) using market information for sales;

h) time and territory management for sales people;

i) planning for personal professional development;

j) prospecting for new business;

k) sales pipeline management.

NOTE This list is, however, not exhaustive, and might vary per organization

Specific ISR capabilities are discussed in **10.2.3**.

10.2.3 Necessary capabilities of the ISR

ISRs should be trained in basic communication skills required to implement ISAs.

NOTE In this subclause, communication means conversations over the telephone.

ISRs should be able to understand customer issues, and propose a series of activities with effective timing that might potentially resolve those issues. ISRs should be able to:

a) understand the targeted customer's business needs and issues that can be an opportunity to generate opportunities for proposals. Needs may be overt, i.e. the decision-maker already recognizes them and is ready to buy, or potential, i.e. the decision-maker is not aware of them or has not developed their thinking about them. The ISR can add value to the customer by using question to uncover potential needs. This might create further business opportunities;

b) imagine (with the help of call plans) the issues that the customer's business might encounter and discuss those with the customer. One-sided communication about products, or merely responding to customer requests, is unlikely to further the business relationship;

c) create a link for conversations leading towards business negotiations as follows:

• the ISR promotes their organization and the strengths of its products/services as a means of resolving the customer's issues;

• possible customer reactions should be planned with a view to establishing permission to make a formal proposal and/or enter into more detailed negotiation.

The capabilities and prerequisites of ISRs, and the scope of work in which they are involved, differ slightly depending on the objectives and design of the inside sales function, such as whether both inbound and outbound selling are being undertaken. One common characteristic is their ability to communicate. ISRs should be able to demonstrate the following capabilities:

1) listening attentively: i.e. does not interrupt the customer, asks questions to check their understanding of what the customer has said;

2) asking questions: i.e. asks questions from a variety of perspectives, based on the call plan hypotheses;

3) explaining things clearly: explains solutions through the selection of words relevant to the other person's circumstances and issues;

4) empathizing: can develop a deep appreciation of the customer's point of view.

All of these communication capabilities are necessary for all types of sales staff to be successful. Some additional communication capabilities are more important for face-to-face sales staff, such as presenting complex proposals and negotiating terms. Communication capabilities are as important for inside sales staff as knowledge of the services and products your organization provides. However, it is more difficult to develop the ability to communicate than to develop knowledge of services and products through training. Because the role also involves extensive use of the information system, ISRs should be well-organized and IT-literate.

10.2.4 Inside sales manager responsibilities

It is expected that inside sales managers should be responsible for the following:

a) managing responsible selling;

b) understanding and developing customer accounts;

c) understanding the integrated functions of sales and marketing;

d) sales forecasts and target setting;

e) leading a team;

f) motivation and compensation for sales teams;

g) coaching and mentoring;

h) designing, planning and managing sales territories;

i) analysing the financial potential and performance of customer accounts;

j) relationship management for account managers;

k) bid and tender management for account managers;

l) developing a product portfolio.

NOTE This list is, however, not exhaustive, and might vary per organization

Specific inside sales manager capabilities are discussed in **10.2.5**.

10.2.5 Inside sales manager capabilities

The inside sales manager plays an extremely important role in ISM. It is not reasonable to expect ISAs to be successful simply by pointing the ISR toward the activities, even after ensuring they understand the objective of the activities.

Usually, inside sales managers have ISA experience, but it is not absolutely essential. They should have a comprehensive understanding of ISAs and the overall sales function, but they may have acquired leadership capability in other functions.

The following are important capabilities in an inside sales manager:

a) leadership: they should be able to motivate ISRs to achieve personal and organizational goals (see **10.5**);

b) IT literacy: they should be able to operate and support the customer database and operational support system, and create reports that clearly express issues and propose improvements.

ISRs spend a large part of the day in a busy call centre, where pressure to achieve daily activity targets is intense. The inside sales manager needs to be available, able to offer encouragement and solve any problems that arise.

10.2.6 Appraisals

Appraisals of ISRs should evaluate their performance in activity indices and achievement of short-term targets, together with assessing their capabilities and potential for progression.

10.3 Training

10.3.1 Training programme menu

To support ISRs and inside sales managers in the achievement of their targets, and to continuously improve their performance, the organization should implement systematic training. Training in sales communication skills using the telephone, which plays a central role in ISAs, can be time intensive. An example of a training programme is shown in Annex D.

The subclauses that follow describe the role of monitoring and role-play in training to improve ISR skill levels.

10.3.2 Monitoring

The organization should keep recordings of telephone conversations between ISRs and customers for training purposes. Recordings are a way of playing back to ISRs where communications with a customer could have been improved, and where conversations have been handled well. A catalogue of the ISRs strengths and weaknesses can provide a prioritized list of actions for further training and coaching.

The following should be checked when monitoring recordings:

a) conversation does not digress from the objective;

b) communication with the targeted customer is logically established;

c) transmission of information and selling points are conducted in line with the customer's needs and interests.

Training using role-play can be used as preliminary preparation for implementation of these points.

10.3.3 Role-playing

The main significance of role-playing for ISAs is that the ISR is physically unable to see the face of their customer when using the telephone. This means that there is a loss of visual cues, such as yawning, finger-tapping, or smiling. However, customers do provide audible cues, conveying enthusiasm or indifference in their tone of voice.

An ISR should be able to sense the other person's reactions and situation using only their responses and the tone of their voice. Changing the way things are said and re-arranging the flow of the conversation according to the customer's reactions are helpful in establishing rapport with them. A call plan is only a guide to the conversation; it is not something that necessarily helps the conversation flow smoothly. Actual

conversations flow from the words spoken by the ISR, so the objective of the ISA might not be reached in a conversation that seems clumsy and unnatural.

Training using role-plays helps to achieve the objective of the ISAs, as the ISR is practising how to establish natural conversations given a variety of reactions from customers. Training should be repeated until the conversation skills exemplified by the ISR are considered sufficient.

There may be a specific person responsible for ISR training and skills development in a large organization. However, team leaders and the inside sales manager should also have some responsibility for continuously improving ISR skills through coaching. In small organizations, training may also be their responsibility.

10.4 Steps for developing capabilities and forming careers

These subclauses describe the infrastructure for the career development of ISRs.

10.4.1 Evaluation criteria

Any career development plan should start with an audit of the ISR's current skills level. The evaluation criteria should be formulated in line with the scope of work assigned to the ISR and the objective of that work. Evaluation criteria should be mapped against categories such as quality of communications, achievement of sales results and organisation of work. Scoring systems should be carefully designed, so that it is clear to the ISRs to what degree they are successful and ready for more complex tasks. The evaluation criteria should be designed to encompass the full scope of the ISR role, and be consistently applied to allow for fair comparisons to be made between ISRs.

10.4.2 Capability evaluations (assessment)

The inside sales manager (or a delegated person such as a team leader) should undertake evaluations. They should be undertaken periodically, and in alignment with the review of salaries. Evaluations can be time consuming for the inside sales manager, training staff and team leaders. A balance is needed between the value of giving frequent feedback to ISRs to facilitate their motivation, and the time involved. The management of workload should give some allowance for feedback from managers and reflection on feedback by the ISRs.

10.4.3 Capability development programmes

Capability development plans should be created for each ISR. Their purpose is both to address the weaknesses of the ISR and build on their strengths to enable them to move on to more senior and complex roles. The career path of an ISR might involve complex inside sales roles, such as managing the most strategic accounts, or a move into face-to-face sales or account management. To help identify specific training to be undertaken, each development plan should state:

• who it is for (name of the ISR);

• who is responsible for the ISR's supervision;

• the skills targeted for development;

• the current and target level for those skills;

• the time frame for achieving the target level, and;

• the methods in place to achieve the target level.

10.4.4 Career path

When an ISR has improved their skills through the capability development plan and the training identified, and exhibits a high level of performance as a result, they should be rewarded accordingly. In the short term, two types of recognition should be considered – the first is to improve the ISR's salary and the second is to give one-off performance rewards, such as financial bonuses or symbolic benefits such as presentation of awards at special events. In the longer term, the successful ISR who trains hard, accumulates experience and demonstrates a strong track record expects improvements in their job responsibilities and status, either within the inside sales function or a transfer within the organization to another role where they can utilize their skills. Satisfying the necessary capability prerequisites for the new role is a presumed condition for migrating roles or achieving a rise in rank. Individuals should not be migrated simply as a result of demonstrating sufficient skills for their current position.

10.5 Managing motivation

Setting appropriate incentives is a key factor in enabling the motivation of sales staff, including ISRs and inside sales managers. Incentives are intended to encourage eagerness and resilience, leading to strong performance. The ratio between salary and bonuses varies according to the product/service type and customer segments served. However, monetary incentives are not the only source of motivation, and care should be taken to ensure that incentives are appropriate to achieving all customer related objectives. Monetary rewards that encourage sales volume at the cost of customer satisfaction could be counter-productive in the long term. Incentives are also a method for recognizing ISR contributions to success; therefore symbolic rewards are also important.

Other non-monetary rewards include:

a) positive feedback from the face-to-face sales staff or targeted customers, to provide a sense of accomplishment;

b) giving awards (usually presented by very senior managers);

c) operating a skill certification programme to give a sense of self-satisfaction for growth.

Monetary incentives promote short-term improvements in growth. Non-monetary incentives provide a rationale for long-term skills growth and skills development activities. The time frame appropriate for incentives for inside sales roles is an important aspect in their design.

Annex A (informative)
Market segmentation

Market segmentation is usually a marketing function. Marketing should determine target customer groups. The evaluation criteria for market segmentation, based on the sales objective, should be defined and explained to ISRs.

Market segmentation may be done on assumed needs for the organization's product or service, and profiles of prospective customers may be defined from information in company directories. For example, a small company making high-quality warm clothing may wish to target independent clothing retailers in locations with harsh winters.

For ISA purposes, it is also necessary to brief the ISR on the current and desired relationship level for the companies on the call list:

a) building customer relationships: converting suspects to prospects;

b) maintaining customers: the successful continuation of regular business with an existing customer or account;

c) deeply cultivating customers: extending share of wallet within an existing client or account.

The table below includes the type of data about business attributes that are likely to be available to prioritise calls and to inform the ISR before preparing their call.

When determining the businesses to be targeted for activities, the results expected from the targeted businesses should be calculated per segment, and the call list prioritised to improve the productivity of the inside sales function.

Table A.1 – Prioritization data

Objective	Evaluation method	Examples of business attribute data
Building customer relationship	Possibility of becoming a business opportunity	Business type, location, annual sales, number of employees
	Scale of business opportunity	Annual sales, number of employees
Maintaining customers	Possibility of continuation	Purchased products, number of years of agreements, listed/not listed, acquired number of leads
	Scale of the business opportunity	Past purchasing amounts, annual sales, number of employees
Deeply cultivating customers	Room for further business opportunity	Purchased products, number of years of agreements, listed/not listed, acquired number of leads, past purchasing amounts
	Diversity of needs	Annual sales, business type, number of employees

Annex B (informative)
Activity design example

B.1 Approach design

This relates to the process of approaching customers and prospects. Activities within the process may vary according to the target customer's market segment attributes, and the quality of the relationship with them.

B.2 Approach type definitions

The type of approach adopted can generally be divided into the following three classifications:

a) prospecting, i.e. the ISR is assigned by suspect list. The ISR periodically contacts assigned companies based on individual scenarios in order to build a relationship with a decision-maker and create business opportunities;

b) account management, i.e. the ISR has responsibility for regular contact with existing customers and clients. The ISR periodically contacts assigned customers in order to reinforce the relationship with a decision-maker and discuss potential business opportunities;

c) campaign, i.e. the ISR is assigned by campaign. Each of these campaigns has a scenario based on products or issues and a target list. ISRs are assigned, per campaigns and per target list, in order to create business opportunities. There may be separate lists for suspects and existing customers.

B.3 Activity type definitions

Define the activity content in further detail. Table B.1 provides examples of the activity types required in inside sales processes.

Table B.1 – Example activity types required in inside sales processes

Activity type	Activity content	Scenario policy
Profile call	Identify contact at organization for which no pre-existing contact exists, based on a definition of the key person, and establish a profile of that contact.	As a general rule, a call that utilizes a uniform scenario of presumed need for all targets.
Campaign call	Strive to understand needs and considerations after exposing presumed issues, in order that an opportunity can be generated.	Calls based on an individual scenario that corresponds to the circumstances of the target.
Relationship call	Periodically contact a customer or client; deepen understand of their needs; discuss presumed issues.	Calls based on selling points that correspond to individual organizational circumstances.
Case cultivating call	Cultivate with proper timing, according to individual opportunities; try to make a proposal.	Calls based on selling points that correspond to individual case circumstances.
Verification call	Check progress status of prospect/customer at defined times, according to individual opportunities.	Call that utilizes a uniform scenario, as a general rule, for all targets, while changing the theme.

Annex C (informative)
Peripheral equipment and software

C.1 General

This annex describes typical infrastructure items used in ISM.

C.2 Conversation recording device

This is a device for recording the approach made by an ISR on the telephone. A conversation recording device is needed for the following reasons:

a) the ISR themselves can listen and learn from the content of the conversation;

b) the inside sales manager can understand the status of the ISRs' activities, and use that information for seminars and training; and

c) it is possible for the person in charge of face-to-face sales and the person responsible for the sales department to accurately understand the targeted customer 'temperature' and 'nuance' in relation to the content of the proposal.

It is necessary for individual conversations to be identified. The recorded content should be equipped with a search and extract facility.

C.3 Mailers

This is a system for supporting the sending and receiving of email between individual targeted customers and the ISR.

The use of this system should be considered (working alongside general business mailers) because:

a) the content sent to targeted customers is shared and accumulated in a database, etc., rather than only being stored in the ISR's own mailer; and

b) the sending and receiving logs are accumulated and shared. The content of emails received from targeted customers is available for later analysis.

C.4 General mail distribution system

Although generally associated with marketing campaigns, it is frequently necessary for inside sales functions to send email with the same content to all targeted customers, or all targeted customers within a particular search criteria, at the same time. A system is needed that can implement mass email distribution. The results of the distribution should be logged in the operational support system and it should be possible to access and analyse these results easily.

C.5 Website

In addition to telephone and email, websites are effective tools within ISAs.

Websites are a supplement to information provided when making an approach telephone call or email, and are appropriate for executing activities in combination with these methods.

The history of contact (referencing) to the website, and logs and content of requests for materials, etc. received through the website should be summarized, and shared as information about activities with targeted customers.

Depending on the existence of these histories and logs, call plans can be adjusted, the customers' decision-making cycles may be shortened, and the productivity of sales activities increased.

C.6 Social network within an organization

The experiences and opinions of ISRs about their work can be shared and accumulated in an internal social network for subsequent use by ISRs and other functions within the organization.

Annex D (informative)
Training programme menu (Example)

Table D.1 – Basic communication skills training programme (example)

Training programme menu	Implemented content
(Fundamental) Positive listening	Learn to listen carefully to the customer; discern requirements.
(Practical) Positive listening	Learn and practise, in a workshop format, the role of listening in building a good relationship with the targeted customer.
(Fundamental) Logical thinking	Learn and practise, in a workshop format, the logical thinking needed to make it easy to structure and transmit information.
(Practical) Logical thinking	Learn how to analyse problems and identify solutions. using models.
Making proposals	Learn the difference between transferring information and communicating value.

Table D.2 – ISR skills training programme (example)

Training programme menu	Implemented content
Administrative skills	Learn how to organize your own activity from call lists and call plans, and report activity via the information system.
Reaching representatives and developing key people	Learn the necessary conversation skills to connect to the key buying decision-maker.
Explaining the basis for the telephone call and understanding the circumstances	Learn skills to open conversations, to understand the psychology of rejection, and to ask questions.
Purchasing psychology and prioritizing needs and issues	Learn purchasing motivation and behaviour, potential needs for targeted products. Use these to prioritize issues, and identify selling points.
Drawing out needs and issues	Learn how to ask questions effectively to discern customers' issues.
Identifying and appealing to needs and issues	Learn how to use questions to drill down from apparent needs to fundamental problems and the risks of not addressing them.
Practical role-playing	Use role-playing to apply skills to a variety of scenarios.

Bibliography

Further reading

BS 18477, *Inclusive service provision – Requirements for identifying and responding to consumer vulnerability*

BS EN 15858, *Customer contact centres – Requirements for service provision*

BS ISO 10002, *Quality management – Customer satisfaction – Guidelines for complaints handling in organisations*

EUROPEAN COMMUNITIES DIRECTIVE 2011/83/EU of the European Parliament and of the Council of 25 October 2011 on consumer rights, amending Council Directive 93/13/EEC and Directive 1999/44/EC of the European Parliament and of the Council and repealing Council Directive 85/577/EEC and Directive 97/7/EC of the European Parliament and of the Council.

British Standards Institution (BSI)

BSI is the independent national body responsible for preparing British Standards and other standards-related publications, information and services. It presents the UK view on standards in Europe and at the international level.

BSI is incorporated by Royal Charter. British Standards and other standardization products are published by BSI Standards Limited.

Revisions

British Standards and PASs are periodically updated by amendment or revision. Users of British Standards and PASs should make sure that they possess the latest amendments or editions.

It is the constant aim of BSI to improve the quality of our products and services. We would be grateful if anyone finding an inaccuracy or ambiguity while using British Standards would inform the Secretary of the technical committee responsible, the identity of which can be found on the inside front cover. Similarly for PASs, please notify BSI Customer Services.

Tel: +44 (0)20 8996 9001 Fax: +44 (0)20 8996 7001

BSI offers BSI Subscribing Members an individual updating service called PLUS which ensures that subscribers automatically receive the latest editions of British Standards and PASs.

**Tel: +44 (0)20 8996 7669 Fax: +44 (0)20 8996 7001
Email: plus@bsigroup.com**

Buying standards

You may buy PDF and hard copy versions of standards directly using a credit card from the BSI Shop on the website **www.bsigroup.com/shop**. In addition all orders for BSI, international and foreign standards publications can be addressed to BSI Customer Services.

**Tel: +44 (0)20 8996 9001 Fax: +44 (0)20 8996 7001
Email: orders@bsigroup.com**

In response to orders for international standards, BSI will supply the British Standard implementation of the relevant international standard, unless otherwise requested.

Information on standards

BSI provides a wide range of information on national, European and international standards through its Knowledge Centre.

**Tel: +44 (0)20 8996 7004 Fax: +44 (0)20 8996 7005
Email: knowledgecentre@bsigroup.com**

BSI Subscribing Members are kept up to date with standards developments and receive substantial discounts on the purchase price of standards. For details of these and other benefits contact Membership Administration.

**Tel: +44 (0)20 8996 7002 Fax: +44 (0)20 8996 7001
Email: membership@bsigroup.com**

Information regarding online access to British Standards and PASs via British Standards Online can be found at **http://shop.bsigroup.com/bsol**

Further information about British Standards is available on the BSI website at **www.bsigroup.com/standards**

Copyright

All the data, software and documentation set out in all British Standards and other BSI publications are the property of and copyrighted by BSI, or some person or entity that owns copyright in the information used (such as the international standardization bodies) has formally licensed such information to BSI for commercial publication and use. Except as permitted under the Copyright, Designs and Patents Act 1988 no extract may be reproduced, stored in a retrieval system or transmitted in any form or by any means – electronic, photocopying, recording or otherwise – without prior written permission from BSI. This does not preclude the free use, in the course of implementing the standard, of necessary details such as symbols, and size, type or grade designations. If these details are to be used for any other purpose than implementation then the prior written permission of BSI must be obtained. Details and advice can be obtained from the Copyright & Licensing Department.

**Tel: +44 (0)20 8996 7070
Email: copyright@bsigroup.com**

9 780580 775154