BD15 Sales Code Set

Interpersonal and public interactions with prospects and customers to promote collective or individual abilities, educate regarding specific services being offered or sought, and obtain commitments to acquire said services.

BD15.10 Sales Strategy

A plan for selling products and services and increasing profits. Sales strategies identify pursuit opportunities regarding existing and potential clients as well as referral sources.

BD15.15 Sales Forecasting

The process of estimating future sales to enable informed business decisions, predict short-term and long-term performance and set performance goals. Forecasts can be based on past sales data, industry-wide comparisons, and economic trends.

BD15.20 Relationship Development and Management

The interpersonal interaction (one-on-one meetings, telephone calls, networking, etc.) that you engage in with prospects and customers to promote collective or individual abilities, educate regarding specific services being offered or sought, and obtain commitments (closing) to acquire said services.

BD15.25 Proposals

The development of responses to panel opportunities, request for proposals (RFPs) or tenders, formal proposals, pitch books or similar documents used to generate new business opportunities.

BD15.25.10 Qualification

Determining the quality and appropriateness of the organization seeking the business opportunity. Alignment with strategic and financial objections are often among considerations.

BD15.25.15 Development

The collection of required information and producing the proposal or response in the required format.

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BD15.25.20 After-Action Reviews

The review and analysis of results from proposal efforts to learn more about contributors to the outcome (positive or negative).

BD15.30 Client and Relationship Management

Managing the relationship between the practitioner and a person or organization using the services of a lawyer.

BD15.30.10 Relationship Management

Managing and supervising client/customer relationships. It includes assigning of resources, defining scope of work, and establishing the operational and financial terms of service. Includes adherence to defined requirements for reporting, staffing, etc.

BD15.30.15 Client Service

The provision of service to clients before, during and after a purchase. Client service concerns the priority an organization assigns to client service relative to components such as product innovation and pricing.

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