

Advanced Sales Order Management

Category	Description	Content	Proposed Dates
Customer Sales Order Management	Sales Process	<p>Training on today’s more sophisticated sales order management processes and skills</p> <p>Improve your skills relating to the sales processes, including advanced customer order processes, delivery and payment methods</p> <p>Specifically:</p> <ul style="list-style-type: none"> • Develop the skills necessary to prepare a sales quotation including learning the skills to price a job and present the quote to the customer • Learn sales order processes including work scheduling and checking material availability • How to set delivery dates and allocate inventory • Training on effective communication skills • Learn effective order scheduling • Understanding shipping, including kitting, and learn proper invoicing processes and timing 	
	Key Order Information	<ul style="list-style-type: none"> • Develop the skill to identify what information is necessary to effectively communicate with a customer and deliver on the sales order • Develop the knowledge and skills to set and manage payment terms and credit terms 	
	Customer Transactions	<ul style="list-style-type: none"> • Training on how to structure order fulfillment, set policies and standardize practices • Develop the understanding of and skills for effective delivery including exceptions such as prepayment, shipping before invoicing, returns, crediting returns, and customer credits 	

	Customer Paperwork	<ul style="list-style-type: none"> • Advance your knowledge of sales documentation and how to write it • Understand what business requires in sales documentation • Developing and writing the sales documentation to meet specific business needs including order acknowledgements, packing lists, invoices, credit memos, and bills of lading 	
	Business Intelligence	<ul style="list-style-type: none"> • Learn the importance of and skills to be able to share and analyze business information across all departments in the company • Understand the importance of and be able to use and analyze customer order information, sales information, inventory and sales history to future planning purposes • Training on how to communicate this information to stakeholders within and across departments 	

Sessions: 5+

Frequency: Twice a week recommended

Hours: 10+

Instructors: Shubhang Vayeda, Das Karia, Yazan Alamaireh, Ishu Singh

Course Capacity: 1-10 attendees recommended

Cost: \$225-275/hr. Prices are subject to change.