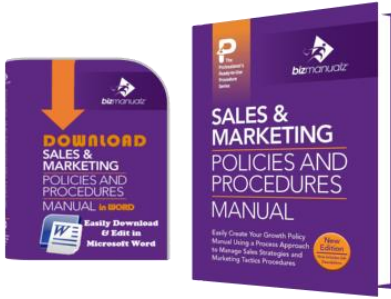


SAMPLE FROM THE SALES & MARKETING POLICIES AND PROCEDURES MANUAL INCLUDES AN EXAMPLE PROCEDURE, A LIST OF TOPICS, FORMS AND JOB DESCRIPTIONS



Sales & Marketing Policies and Procedures Manual

Sales and Marketing Procedures manual takes best practices and sound advice from experts in the sales and marketing fields and brings them together in one well organized, easy-to-use, and readily customizable template to manage your **sales and marketing processes**. The Sales and Marketing Procedures manual helps you organize and manage these essential functions, giving you direction and guidance to help you turn the art of marketing and sales into science. This manual helps you break down the barriers between **sales and marketing departments**. It emphasizes communication and unity of purpose, helps you set a clear course for your sales and marketing strategy, and lays the foundation for continual improvement.

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Job Descriptions: There are 22 positions referenced in the Sales & Marketing Polices and Procedure Manual. Each position includes a summary description, essential duties and responsibilities, organizational relationships, referenced procedures, qualifications, physical demands, and work environment.

Accounting Manager Board Member Chief Executive Officer (CEO) Customer Service Manager Customer Service Representative Director of Quality Engineering Manager Human Resources Manager	Internet Marketing Manager Manufacturing Manager Marketing Manager Marketing Researcher Procurement Manager Product Development Assistant Product Manager	Production Manager Public Relations Manager Quality Manager Sales Manager Sales Representative Service Manager Trade Show Coordinator
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41 Prewritten Policies and Procedures

<p>Marketing Planning</p> <ol style="list-style-type: none"> 1. Strategy Team 2. Stakeholder Analysis 3. Vision and Mission 4. Marketing Research/ Analysis 5. Situational Analysis 6. Goals and Objectives 7. Marketing Strategy 8. Marketing Plan 9. Social Media Strategy <p>Marketing Tactics</p> <ol style="list-style-type: none"> 10. Advertising 11. Internet Marketing 12. Public Relations 13. Trade Shows/Events 14. Direct Mail 15. Lead Management <p>Sales</p> <ol style="list-style-type: none"> 16. Customer Life Cycle Management 17. Sales Management 18. Qualifying Leads 19. Sales Calls 20. Customer Improvement 	<p>Sales (Con't)</p> <ol style="list-style-type: none"> 21. Customer Service 22. Telephone Answering Policy 23. Complaint Handling 24. Post-Sale Customer Follow Up 25. Customer Satisfaction Survey 26. Service Satisfaction <p>Sales and Marketing Administration</p> <ol style="list-style-type: none"> 27. Document Control 28. Record Control 29. Sales Supplies 30. Sales Compensation 31. Sales Hiring 32. Sales Training 33. Meetings <p>Product Management</p> <ol style="list-style-type: none"> 34. Product Life Cycle Management 35. Product Development 36. Product Launch 37. Product Recalls 38. Customer Requirements 39. Warranty and Service Policies 40. Service Parts Pricing 41. Customer Returns
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102 Corresponding Forms and Records

<p>Marketing Planning</p> <ol style="list-style-type: none"> 1. Project Planning Timeline (Sample) 2. Project Status Report 3. Strategy Team Review Checklist 4. Project Progress Review Checklist 5. Stakeholder Analysis Matrix 6. Stakeholder Analysis Review Checklist 7. Stakeholder Analysis Report 8. Market Segmentation Worksheet 9. Marketing Database 10. Market Analysis 11. SWOT Analysis Worksheet 12. Competitive Analysis Worksheet 13. Situational Analysis Report 14. Goals/Objectives Worksheet 15. Goals/Objectives Statement 16. Marketing Strategy Matrix 17. Strategy Checklist 18. Marketing Strategy 19. Marketing Plan 20. Marketing Budget Template 21. Social Media Planning Worksheet 22. Social Media Plan 23. Social Media Calendar 24. Social Media Log 25. Social Media Policy & Acknowledgement 	<p>Marketing Tactics</p> <ol style="list-style-type: none"> 26. Advertising Review Worksheet 27. Advertising Objectives-Strategies Worksheet 28. Advertising Plan 29. Advertising Schedule (Sample) 30. Internet Planning Worksheet 31. Internet Plan 32. Keyword Log 33. Public Relations Plan Worksheet 34. PR Event Checklist 35. Public Relations Plan 36. Media Kit Checklist 37. Press Release Template 38. PR Events Log 39. Trade Show / Event Planning Worksheet 40. Trade Show Event Plan 41. Trade Show Worksheet 42. Trade Show Checklist 43. Trade Show / Event Supply Checklist 44. Equipment Request from Inventory 45. Show Registration 46. Visitor Evaluation 47. Trade Show / Exhibit Summary 48. Direct Mail Planning Worksheet 49. Direct Mail Budget Worksheet 50. Direct Mail Plan 51. Lead Management Plan 52. Leads Database 53. Lead Management Status Report
<p>Sales</p> <ol style="list-style-type: none"> 54. Customer Life Cycle Management Plan 55. Sales Management Plan 56. Sales Forecast 57. Weekly Sales Summary 58. Prospect Management Plan 59. Prospect Database 60. Lead Questionnaire 61. Sales Plan 62. Customer Database 63. Order Database 64. Customer Contact Worksheet 65. Sales Account Maintenance Plan 66. Customer Improvement Plan 67. Customer Improvement Goals Worksheet 68. Customer Complaint-Feedback Strategy 69. Phone Message 70. Customer Service Contact 71. Customer Service Log 72. Post-Sale Satisfaction Report 73. Customer Satisfaction Survey 74. Customer Service Satisfaction Report 	<p>Sales and Marketing Administration</p> <ol style="list-style-type: none"> 75. Qualification Checklist 76. Interview Guidelines 77. Competency Matrix 78. Individual Training Record 79. Training Plan 80. Meeting Agenda <p>Product Management</p> <ol style="list-style-type: none"> 81. Product Life Cycle Management Plan 82. Request for Engineering Action 83. Requirements Definition 84. Product Brief 85. Design Review Checklist 86. Design Completion Checklist – Electromechanical Devices 87. Design Completion Checklist – Non-Electromechanical Devices 88. Product Test 89. Product Launch Plan 90. Product Recall Request (Internal) 91. Food Product Recall Checklist 92. Non-Food Product Recall Checklist 93. Product Return Form 94. Customer Requirements Checklist 95. Limited Warranty Form (Sample) 96. Returned Goods Authorization 97. Customer Returns Database