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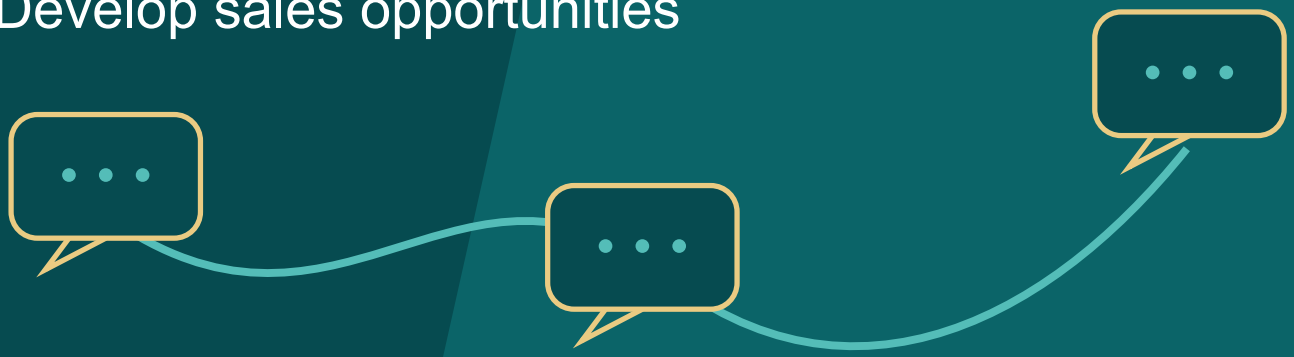
LEARNING SALES

from the Ground Up

Understand customers
Lead sales conversations
Develop sales opportunities



From the first contact to the next step

With practical cases, resources and a test with answers

Katja Stein

First Edition

Deine-Akademie24

Learning Sales from the Ground Up

Understanding Customers
Leading Sales Conversations
Developing Opportunities

A practical handbook with sample conversations practical resources and a self assessment test

First Edition
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Foreword

Dear reader,

I am glad you have opened this book. You may be taking your first steps in sales, looking for direction after a career change, or hoping to approach your conversations more thoughtfully. With this book, I would like to help you develop a dependable way of working, one step at a time.

To me, sales begins with a connection between people. Good conversations start with curiosity and honest questions. They give customers space and help you understand what they need. This also means being open when a solution is unsuitable or a question still needs an answer.

You do not have to master everything at once. Read at your own pace, try the exercises and find words that feel natural to you. The examples are there to help you get started. Use them only when they are factually accurate and appropriate to the situation.

As the founder of Deine-Akademie24 and the author of this book, I want to make knowledge useful in practice. That is why you will find sample conversations, practical resources and a self assessment test alongside the fundamentals. After reading, choose one small, specific step to try and reflect on what you learn from it.

I hope you enjoy learning, find the confidence to start new conversations and stay attentive to the people you work with.
Warm wishes,
Katja Stein

Katja Stein
Founder of Deine-Akademie24 and author
www.deine-akademie24.de

How to use this book

The book is divided into six parts. Part I introduces the role of sales and a professional approach. Part II covers understanding customers, communication and explaining customer benefits. Part III takes you through preparation, conversations, objections and closing. Part IV connects prospecting with customer retention and sales organisation. Part V contains practical cases and a final test. Part VI provides practical resources and suggested wording. A glossary and source notes complete the book.

Keep a learning log. Record the topic, exercise, observation and next step. Use invented customer details in role plays. For real customer contacts, follow your organisation’s procedures and the rules applicable to the particular sales channel.

Note on examples and assumptions: The scenarios, names, businesses and figures in this book are illustrative. They are not verified customer results or market values. Numerical examples use model assumptions and are not forecasts. Before applying an example calculation, replace its assumptions with appropriate, verified figures.

This is an English translation of a German sales handbook. The legal sections refer to Germany and to applicable European Union data protection law. They do not describe the legal requirements of the United Kingdom, the United States or other jurisdictions. References to German legislation, euro amounts and German business contexts have been retained. This translation does not provide a professional licence or replace an assessment of the rules applicable to a particular activity.

Performance indicators can only be compared when their numerators, denominators, time periods and case statuses are consistent. A sales conversation conversion rate therefore differs from a rate based on sales opportunities. Define exactly what is being counted before carrying out an analysis.

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Part I The Fundamentals of Sales

Chapter 1 Understanding the sales function

1.1 What sales is and what tasks it fulfills

What does sales actually mean?

Sales sounds like selling at first. And that's exactly what it's about – however, there's a lot more to it than simply offering a product to a customer.

Sales is about acquiring customers, finding out what they need, and offering them a suitable product or service. The goal, of course, is to generate revenue for the company. At the same time, the customer should feel well-informed and able to make an informed decision.

A good salesperson doesn't try to sell something to every customer. They want to understand what the customer is looking for, what their needs are, and how the company can help them.

An everyday example:

Imagine you work for a company that offers online training courses. A prospective student contacts you because she wants a career change. However, she's not yet sure which training course is right for her.

It would be counterproductive to immediately offer her the most expensive course. Instead, you should first ask about her career goals, her previous experience, and her expectations. Then you should explain which further training might be suitable for her situation.

You answer her questions, explain the costs, and show her what options are available. If she decides to take a course, you support her until completion.

That's exactly what sales is: You bring supply and demand together and help the customer make the right decision.

What are the tasks of the sales department?

Depending on the company, the tasks can vary slightly. In some companies, you mainly talk to customers on the phone, in others you create offers, conduct personal meetings, or manage existing customers.

However, the most important tasks are similar in many companies.

1. Acquire new customers

Many companies want to acquire new customers. To do this, they need to reach people or companies for whom their offer might be relevant.

This can happen, for example, via phone calls, emails, personal conversations or social media.

Example: You work for an office software provider and contact companies to find out if they are interested in a new solution.

2. Find out what the customer really needs

Before you offer something, you should understand what the customer is actually looking for. To do this, ask questions and listen carefully.

Sometimes the customer already knows exactly what they want. In other cases, they still need support to better define their requirements.

Example: A customer wants to buy new software. During the conversation, it becomes clear that he primarily wants to save time on his daily office work. You can now explain to him which functions will help him achieve this.

3. Explain products and services

If you know what the customer needs, you can present them with a suitable offer. It's not enough to simply list all the features of a product. You should also explain what benefits the customer will gain from it.

Example: Software automatically reminds users of important appointments. The real benefit for the customer is that they forget fewer appointments and can better organize their workday.

4. Create offers and close sales

Depending on your role, you will create offers, discuss prices, and answer any questions. The goal is to clarify with the customer whether the offer is suitable and whether they wish to accept it.

Example: After a consultation, you send the customer a quote outlining the agreed services and costs. You then follow up to clarify any remaining questions.

5. Serving existing customers

Sales doesn't automatically mean that everything is finished after the purchase. Many companies want to retain their customers long-term. Therefore, remaining available even after the sale is often part of the process.

Perhaps a customer has a question, needs an additional service, or would like to extend their contract.

Example: You call an existing customer, inquire about their satisfaction and check if they need further support.

6. Document discussions and results

Organization is also part of everyday sales work. You record who you have spoken to, what wishes the customer expressed, and what should happen next.

Many companies use a CRM system for this purpose. This is software that manages customer contacts, meeting notes, offers, and sales opportunities.

Example: You spoke on the phone with a potential customer who wants to make a decision next month. You document the conversation and schedule a follow-up so you can get back to them at the agreed time.

What does a company want to achieve with sales?

Of course, a company wants to make money. But that's not the only goal. Successful sales should also ensure that new customers are acquired, existing customers remain satisfied, and the company can operate profitably in the long term.

The main goals are:

Increase sales: Successfully sell products and services.

Acquiring new customers: Expanding the customer base and building new business relationships.

Satisfying customers: Making offers that match actual needs.

Retaining customers long-term: Building trust and ensuring that customers are happy to return.

Staying competitive: Recognizing what is important to customers and what other providers do better or differently.

Work efficiently: Use your time wisely and keep sales targets in mind.

You should always keep in mind that not every sale is automatically a good one. If you sell a customer something that doesn't suit them at all, it can lead to complaints, dissatisfaction, or even a cancellation later on.

In the long run, it is therefore more sensible to give honest advice and find a suitable solution together with the customer.

What sales does not mean

You might think that salespeople need to be particularly good at public speaking, or that they have to convince every customer of an offer. That's a common misconception.

You don't have to talk constantly, be particularly loud, or have an immediate answer to every question. What's much more important is that you listen attentively, ask the right questions, and can explain things clearly.

Saying no is also part of everyday sales. Not every customer is interested, not everyone needs the product being offered, and sometimes the timing simply isn't right.

That's no reason to doubt your own abilities. What matters is how you deal with such situations.

Remember: Good sales isn't about persuading someone until they buy. It's about understanding their needs, offering a suitable solution, and providing the customer with a solid basis for their decision.

1.2 The sales function selling marketing and customer service

The terms sales, selling, marketing and customer service are often used loosely. All four relate to customers and the success of a business, but they describe different areas of work.

Nevertheless, there are differences. If you want to work in sales, you should know who is responsible for which tasks and how the individual departments collaborate.

Let's look at a simple example.

Imagine a company offering online training courses. It wants to attract new participants, sell its courses, and ensure customer satisfaction.

The marketing department draws attention to the training courses.

The sales team contacts potential customers, clarifies their needs, and accompanies them on their way to purchase.

Selling is the part of the process that helps the customer make a purchase decision and complete the transaction.

The customer service team helps participants with questions or problems, for example, with access to the online course.

In practice, these tasks sometimes overlap. Especially in smaller companies, one person often takes on several of these tasks.

1. The sales function Acquiring customers and building relationships

The sales department focuses on acquiring new customers, supporting prospective clients, and developing suitable business relationships from contacts. Maintaining relationships with existing customers can also be part of the job.

It's not just about closing the sale itself. Sales also involves tasks such as preparing for meetings, determining needs, creating offers, and following up on open sales opportunities.

Example from everyday professional life:

You work for a provider of online training courses. A prospective student contacted you via the website because she wants to further her professional development.

You call her, ask her some questions about her goals, and explain which further training might suit her needs. Then you agree to send her more information and get back to her next week.

That's sales work. You build the contact, find out what the prospect needs, and accompany them on their way to a possible purchase decision.

Typical tasks in sales:

Finding new customers and prospects

Building and maintaining contacts

Determine customer needs

Present and create offers

Conducting sales conversations

Track sales opportunities

Develop existing customers

2. Selling Turning interest into a purchase

Here, selling is used in a narrower sense than the overall sales function. It focuses on the specific sales interaction and on completing a transaction.

The broader sales function can begin with finding potential customers. Selling focuses more directly on the decision to buy a particular product or service.

Example from everyday professional life:

The prospective student from our example has already researched the various training courses. She knows which course she wants to take and only has questions about the price and the schedule.

You answer her questions, discuss the terms and conditions, and explain the next steps. The prospective student decides to take the course and completes the booking.

The focus here is on the actual sale.

Businesses do not always draw this distinction. Sales and selling are often used interchangeably, so check how a particular organisation defines its roles. A sales representative may be responsible for both acquiring new customers and closing sales.

Typical tasks involved in selling

Respond to buying interest

Present the product or service in detail

Answer questions about prices and services

Clarify objections

Support the purchase decision

Complete the order or contract

3. Marketing – Creating attention and arousing interest

The task of marketing is to make a company, its products and its services known and to arouse the interest of potential customers.

For example, the company considers which target group it wants to address, what information is important to these people, and which channels are best for reaching them.

Marketing takes place on websites, in social media, via search engines, in newsletters or through advertising campaigns, among other things.

Example from everyday professional life:

The company posted a Reel on Instagram about the advantages of online training. It explained that participants can learn flexibly and access their learning materials online.

A person sees the reel, is interested in the offer, and clicks on the website.

In this case, marketing helped to generate attention and draw the attention of a potential customer to the offer.

Typical tasks in marketing:

Defining target groups

planning advertising campaigns

Create content for social media

Designing websites and landing pages

conduct search engine marketing

Building brand awareness

Make potential customers aware of offers

Marketing and sales often work closely together. Marketing, for example, ensures that potential customers get in touch. Sales then takes over personal contact and tries to determine whether there is a genuine need.

4. Customer service – supporting customers after purchase

Customer service is there to support customers with questions, problems, and concerns. This can happen before, during, or after a purchase, although the focus is often on post-purchase support.

Customer service is not primarily about selling something. Rather, it's about enabling the customer to use the offered service and having a reliable contact person in case of difficulties.

Example from everyday professional life:

The prospective student has booked her training course and wants to start learning. However, she cannot log in to her user account.

She contacts customer service. An employee checks the problem and explains how she can regain access to her course.

This is not about closing the sale, but about solving the problem and helping the customer.

Typical tasks in customer service:

Answering questions about products and services

Help with technical problems

Handling complaints

Receive complaints

Provide information about existing contracts

Help customers use the product or service

Document problems and coordinate solutions

There are overlaps here as well. A customer service representative might, for example, draw a customer's attention to an additional service. However, as long as support remains the primary focus, their main task is still providing service.

The four areas in direct comparison

Area	Main task	Typical destination
marketing	Generate attention and arouse interest	Reaching potential customers
Sales function	Acquire customers, identify needs,	Create and utilize sales opportunities

Area	Main task	Typical destination
	and develop business relationships	
Selling	Accompany and complete the actual purchase.	Obtain order or contract
Customer service	Customer support with questions and problems	Satisfaction and reliable support ensure

A simple mnemonic device will help you remember the differences:

Marketing: Making people aware of the offer.

The sales function: Identify potential customers, make contact and develop relationships.

Selling: Help the customer reach and complete an informed purchase decision.

Customer service: Ensuring that customers receive support.

This is a simplified classification. In reality, the tasks may be distributed differently depending on the company.

How do the different departments work together?

It works best when all four areas communicate with each other and exchange information.

Let's take our example of online training again:

The marketing department publishes an article about further education.

An interested person visits the website and leaves their contact details.

The sales department makes contact, determines the need and discusses suitable options.

During the sales conversation, the last questions are clarified and the booking is completed.

Customer service helps new participants access the course or with any later questions.

This creates a cohesive process. Each department takes on a specific task, but all contribute to the company's success.

If marketing attracts many prospects but sales doesn't follow up with them promptly, potential sales opportunities may be lost. Similarly, if sales closes many deals but customer service is difficult to reach, customer satisfaction can decline.

Therefore, it is important that the departments not only pursue their own goals, but also collaborate.

What does that mean for your daily work?

If you're applying for a sales position, you should carefully review the job description. The term "sales" doesn't mean the same thing everywhere.

Some positions consist mainly of acquiring new customers by phone. Others focus on managing existing customers, preparing quotes, or supporting the sales force.

It is also important to distinguish this role from customer service. For example, a position titled "Inside Sales" might involve processing customer inquiries, preparing quotes, and coordinating appointments for field sales representatives.

In another position, actively acquiring new customers by phone can constitute the majority of the work.

Therefore, when looking at job advertisements, pay attention not only to the job title, but above all to the actual tasks.

1.3 Why companies need sales

Imagine a company has developed a really good product. It's high-quality, solves a problem, and the price is right. Despite this, hardly anyone buys it.

What is the reason for this?

Quite simply: if no one knows about the offer or understands its advantages, it will be difficult to sell. This is precisely where sales comes into play.

Companies need sales so that their products and services are not only offered but actually purchased. It's simply not enough to develop something good. You also have to reach the right customers, understand their needs, and show them why the offering might be interesting to them.

No customers, no revenue.

Every company needs to make money if it wants to survive in the long term. For this to happen, customers must be willing to spend money on the products or services offered.

Sales helps to find these customers and turn prospects into actual buyers.

An everyday example:

A company offers software that helps small businesses organize their office work more easily. The software works well, saves time, and costs 49 euros per month.

The company publishes information on its website, but hardly anyone gets in touch. Many potential customers aren't even aware that this solution exists.

Now a sales representative becomes active. He specifically contacts companies, asks about their current workflows, and explains how the software could relieve them of some of their workload.

Several companies are interested in the offer, arrange a presentation, and ultimately decide to enter into a contract.

The result: The company gains customers and generates regular revenue.

This shows you why sales is important. It establishes the connection between a company's offering and the people who might need that offering.

1. Acquire new customers

Companies cannot always rely on customers coming to them on their own. Especially when a company is new to the market or offers a new product, it must actively approach potential customers.

There are various ways to do this. Sales representatives can, for example, make phone calls, write emails, have personal conversations, or network at events.

The sales department can also handle inquiries received via the website or social media.

Example: A company offers office cleaning services. A sales representative specifically searches for companies in the area and contacts them. In this way, the company can acquire customers it might otherwise never have reached.

2. Understand customers and offer suitable solutions

Not every customer has the same wishes and requirements. What is perfect for one person might not be suitable for another at all.

That's why it's important to ask questions and listen in sales. Only in this way can you find out what a customer actually needs.

Example: A customer is looking for a new insurance policy. She primarily wants to insure against a specific type of damage and has a fixed monthly budget.

A good sales representative first clarifies what type of coverage is needed and what conditions are important. Only then does he present a suitable offer.

The advantage: The customer receives a better basis for decision-making, and the company increases the chance that the offer actually meets her needs.

Especially with products or services that require explanation, this personal contact plays an important role.

3. Enabling revenue and growth

A company can only grow if its revenues are sufficient in the long term to cover costs and finance investments.

The sales department contributes by winning new orders, closing sales, and developing existing customer relationships.

This doesn't mean that every sales representative is solely responsible for the company's financial success. Product quality, pricing, marketing, and many other factors also play a role. However, sales is responsible for ensuring that potential business opportunities are converted into concrete orders.

Example:

A company sells 20 maintenance contracts per month for 100 euros each.

This results in a monthly revenue of €2,000 from these contracts. If the sales team succeeds in increasing the number to 35 contracts, this revenue will rise to €3,500 per month.

Simplified calculation example: This refers to revenue, not profit. Costs and cancellations are not included.

Increased revenue can help a company hire more employees, develop new products or services, or invest in better equipment.

4. Retain existing customers

Many companies focus heavily on acquiring new customers. In doing so, they sometimes forget how important existing customers are.

Customers who are satisfied with a company may make another purchase, renew a contract, or recommend the company to others.

Sales can contribute by staying in regular contact with customers, identifying new needs, and presenting suitable additional services when required.

Example: A company already uses a provider's accounting software. A few months later, it also needs a solution for human resources management.

The sales representative is already familiar with the company and can assess whether the additional offer makes sense.

This allows an existing business relationship to be further developed without the company having to acquire a completely new customer.

It is important that additional offers match the actual needs and that customers are not simply sold anything.

5. Assert yourself against competitors

In many industries, there are several companies offering similar products or services. Customers can compare and choose the provider that best meets their needs.

Therefore, simply having a good product is often not enough. The company must also be able to explain what makes its offering stand out.

The sales team helps to clearly communicate the benefits and address any questions or concerns.

Example: Three companies offer similar office services. One stands out with particularly fast processing, another with a low price, and the third with a personal contact person.

During the conversation, the sales representative finds out what is particularly important to the customer. If the customer values personal service, the representative can explain how the company fulfills this wish.

He should stick to the facts and not badmouth the competition. The crucial thing is to clearly demonstrate the benefits of his own offering.

6. Collect and share customer feedback

Sales staff are often in direct contact with customers. This allows them to learn about recurring questions, what customers value about a product, and where they encounter difficulties.

This information can be very valuable to the company.

For example, if several customers are missing the same feature or find certain contract terms incomprehensible, the sales department can pass this feedback on to the relevant departments.

Example: Several customers request a more flexible contract term. The sales representative documents this feedback and passes it on to management.

The company can then assess whether an adjustment makes sense.

In this way, sales not only helps with selling. It can also contribute to improving offers and better understanding market needs.

What happens if sales don't work?

If a company does not have a functioning sales operation, this can have various consequences:

Potential customers are unaware of the offers.

Inquiries are answered too late or not at all.

Potential customers choose a competitor.

Offers are made, but not followed up.

Existing customers do not feel adequately cared for.

Revenue opportunities remain untapped.

This doesn't mean that every company needs a large sales department. A small craft business, for example, can acquire many customers through referrals and repeat business. Another company might need an active field sales force or a large internal sales team.

The crucial point is that there is a suitable way to reach customers, process inquiries, and win orders.

Why sales is also important for you as a newcomer to the workforce.

Perhaps you have no prior experience in sales and are wondering if you are even suited for it.

The good news: You don't have to know everything from the start. Many of the skills you need in sales can be learned and practiced.

These include, for example:

Conduct conversations in a friendly and professional manner

Ask the right questions

Listen attentively

Explaining information in an understandable way

Handling questions and objections

Preparing and documenting conversations

Remain professional even if you receive a rejection.

You don't have to be a particularly loud or extroverted person. People can be successful in sales in a variety of ways. What's important is that you engage with your conversation partners, are reliable, and are willing to learn.

Sales can be particularly interesting for career changers because it offers a wide variety of tasks. Some positions focus on making initial contact by phone, others on providing advice, preparing quotes, or managing existing customer relationships.

Which position suits you depends, among other things, on your skills, your interests and the specific requirements of the job.

Here's what you should take away from this chapter

Companies need sales because good products and services alone are not enough. They also need to reach the right customers, understand their needs, and turn prospects into actual buyers.

Sales contributes to generating revenue, acquiring new customers, retaining existing customers, and maintaining a competitive edge. At the same time, it provides crucial insights into customer expectations and areas for improvement.

For you as a beginner, this means: You don't have to be a sales talent right away. If you learn to listen attentively, ask targeted questions, and communicate clearly, you've already laid important foundations for working in sales.

1.4 Selling products and services

When you think of selling, you may first picture a shop where someone buys clothes, a mobile phone or a car. But arranging insurance, selling software and providing paid consultancy also involve sales.

Basically, a distinction is made between products and services. Both can be sold, but there are some differences. If you work in sales, you should be aware of these differences, because depending on what you're offering, you'll need to structure your sales pitch somewhat differently.

What is a product?

A product is an offering that a customer can purchase. Often, this is a physical object that can be touched and used. However, there are also digital products, such as e-books, online courses, or software.

Products have certain characteristics, a price, and a benefit for the customer. Sales is about clearly explaining these characteristics and demonstrating why the product might be of interest to the customer.

Examples of products:

A smartphone

A car

An office chair

A coffee machine

An e-book

A software license

How do you sell a product?

Imagine you work in a furniture store. A customer is interested in an office chair.

You could simply tell him that the chair is height-adjustable, has an adjustable backrest, and costs 299 euros. That's important information, but it doesn't necessarily explain why the chair is suitable for this customer.

It is better to first ask what he needs the chair for.

Does he work eight hours a day at his desk? Or does he only sit at it occasionally? Does he have specific ideas regarding comfort and equipment?

If you know what he values, you can specifically explain which qualities are important to him.

For example, if the customer works many hours a day at a desk, you can show him how to adjust the seat height and backrest and what benefits this has for his individual sitting position.

The crucial point: You're not just selling an item. You're showing the customer the benefits it offers.

What is a service?

When a customer purchases a service, they typically don't buy a product, but rather a service that is provided for them. This could be advice, a repair, training, or another form of support.

A service is often not as tangible as a product. Customers often cannot fully test it before purchasing. Therefore, trust, a clear explanation, and a precise description of the service scope play a particularly important role.

Examples of services:

Insurance advice

A building cleaning service

A management consultancy

A repair

An online training course

A marketing service

How do you sell a service?

Imagine you work for an agency that helps companies digitize their workflows.

A potential client tells you that their team spends a lot of time on manual tasks. Invoices are transferred by hand, appointments are scheduled individually, and information is entered multiple times.

You don't just tell him that your agency offers digitalization services. Instead, you ask more specific questions and find out which processes are particularly time-consuming.

Then you explain which processes could potentially be automated and how this could relieve the company of some of its workload.

In this case, the customer is not buying a tangible product. He is paying for a service from which he expects an improvement in his work processes.

The crucial point: When it comes to services, the customer must understand what they are getting, how the service works, and what specific benefits it can bring them.

The most important differences between products and services

product	service
Often a tangible object, sometimes also digital	A service provided for the customer
Characteristics can often be shown directly.	The process and the expected result often need to be explained.
The customer may be able to test the product before purchasing it.	The actual performance can often only be assessed during or after the service has been provided.
Quality is demonstrated, for example, by material, workmanship, or functions.	Quality is demonstrated, for example, by reliability, expertise, and the result.
Example: a laptop	Example: an IT consultancy

The boundaries are not always clear. For example, software can be sold as a digital product, while setup, training, or ongoing support are offered as a service.

Many companies therefore combine products and services.

What customers are really interested in when buying

A common mistake in sales is to talk too much about one's own product or service.

Sales representatives often know their products or services very well. They know what features are available, how an offer is structured, and what the company can do. This is generally helpful.

But above all, the customer wants to know what the offer means for him.

For that, you should understand the difference between a feature and a benefit.

A feature describes what a product or service offers. The benefit explains what advantage the customer can gain from it.

Let's look at some examples:

Characteristic	Potential benefits for the customer
A laptop has a long battery life.	The customer can work longer without having to look for a power outlet.
An office chair is height-adjustable.	The customer can adjust the seat height to their needs.
Software automates recurring tasks.	The customer can save time in certain work processes.
Further training is available online.	The participant can learn more flexibly in terms of time and location.
A cleaning company handles the regular office cleaning.	The company does not need to organize the cleaning with its own employees.

You shouldn't promise benefits you can't substantiate. For example, an automated software function doesn't necessarily save a certain number of working hours. The actual benefit depends on the customer's processes.

Here's how to formulate your thoughts more convincingly.

Less helpful:

"Our online course consists of videos, texts and exercises."

Better:

"You can watch the learning videos, read the content, and test your knowledge with exercises. This allows you to work through the learning material at your own pace."

In the second example, the properties are still listed. At the same time, it is explained what they mean for the customer.

Another example:

Less helpful:

"We offer digital appointment booking."

Better:

"Your customers can book appointments online. This means you have to arrange fewer appointments by phone and can manage bookings centrally."

The second formulation is more concrete. It shows a potential advantage without the customer having to first consider why the function might be interesting.

How do you figure out what to sell?

Before you introduce a product or service, you should get an idea of the customer's situation.

Simple questions will help you with this:

What are you currently looking for?

What is particularly important to you in a solution?

How have you been solving this problem so far?

What is already working well?

What would you like to improve?

Is there a specific budget or other constraints?

You don't have to ask all the questions in every conversation. What's crucial is that you choose the questions that are appropriate for your situation.

An example:

A customer says he needs new software.

Instead of immediately starting a presentation, you ask: "What do you primarily want to improve with the software?"

The customer explains that he manages a lot of customer data manually and often loses track of it.

Now you know more. You can focus specifically on functions that are relevant for managing customer data, instead of presenting all the software's functions to the customer.

This will make your conversation more personal and more helpful for the customer.

Why trust is so important in sales

Especially with expensive products or services, customers want to be sure they are making a good decision.

They want to know what they are getting, what the costs are, and whether the offer is really right for them.

Therefore you should:

Explain prices and costs transparently.

Clearly state the services and any possible limitations.

Answer questions honestly.

When in doubt, it's better to double-check something than to invent an answer.

Don't promise results you can't guarantee.

Give the customer sufficient space to make their decision.

This is not only fair to the customer, but it also helps to avoid misunderstandings and later complaints.

A professional salesperson doesn't have to close every deal. Sometimes, during the conversation, it becomes clear that the offer isn't a good fit. That's also part of reputable sales work.

1.5 B2B and B2C business customers and private customers

If you work in sales, you will sooner or later come across the terms B2B and B2C. They describe to whom a company sells its products or services.

This sounds more complicated than it actually is. Once you understand the difference, you can easily apply it to various industries.

The most important difference is: Are you selling to another company or to a private individual?

What does B2B mean?

B2B stands for Business-to-Business. It refers to business transactions between companies.

A company offers its products or services to another company. This could be, for example, a software provider that sells companies an accounting solution, or an agency that creates websites for other companies.

Typical examples of B2B:

A software company sells office software to a company.

A wholesaler delivers goods to a retailer.

An agency is handling the social media marketing for a craft business.

A manufacturer sells machines to an industrial company.

A company offers training for the employees of another company.

How does a B2B sale work?

In B2B sales, purchasing decisions are often more complex. This is because a company usually has to consider several factors when making a purchase.

For example, it concerns the costs, the concrete benefits, the quality, the contract terms and the question of whether the investment will pay off in the long term.

Furthermore, sometimes several people are involved in the decision. For example, an employee might need new software, while management or the IT department has to approve the purchase.

An example from everyday professional life:

You work in sales for a company that offers digital solutions for office organization.

You contact a company with 25 employees. In the initial conversation, you learn that many work processes are still done manually. Management wants to save time and improve organization.

You schedule another appointment to discuss the requirements in more detail. Afterwards, you prepare a proposal outlining the services, costs, and potential benefits.

The company reviews the offer and discusses internally whether the solution is suitable. If all parties agree, the contract is concluded.

In B2B sales, there can be several discussions before a decision is made. However, this isn't always the case: smaller purchases can also be completed quickly between companies.

What is particularly important in B2B sales?

Expertise: You should be very familiar with your product or service and its potential applications.

Needs assessment: You need to understand what problem the company wants to solve.

Economic efficiency: Costs and benefits often play an important role.

Reliability: Companies expect binding statements and professional cooperation.

Relationships: Especially with larger orders, long-term customer relationships can be crucial.

Patience: Some decisions take time and multiple votes.

In B2B sales, it is therefore often about explaining a solution in a comprehensible way and showing what business benefits it offers.

What does B2C mean?

B2C stands for Business-to-Consumer. This refers to the sale of a company to private customers.

The company sells its products or services directly to people who want to use them, for example, in their everyday life, their leisure time, or their personal life situation.

Typical examples for B2C:

A furniture store sells a sofa to a family.

A travel agency sells a package holiday to a married couple.

An online shop sells a smartphone to a private individual.

A gym sells a membership to a customer.

A provider sells a private training course to a participant.

How does a B2C sale work?

Private customers often decide for themselves whether they want to buy something. Depending on the product, personal preferences, price, quality, other customers' experiences, or their own budget can play an important role.

Some purchases are completed within minutes. For larger purchases, such as a car or a property, the decision can take considerably longer.

An example from everyday professional life:

You work in sales for a travel company. A customer is interested in a holiday in Egypt.

You ask her when she wants to travel, what her budget is, and what's most important to her about the trip. She explains that she'd like a hotel right on the beach and values good reviews.

You present her with suitable offers and explain the differences in location, amenities, and price. The customer compares the options and ultimately decides on a trip.

Here, the customer's personal situation is the focus. You want to understand what's important to her and help her make the right decision.

What is particularly important in B2C sales?

Clear communication: Explain products and services as clearly as possible.

Customer focus: Address the customer's wishes and questions.

Trust: The customer should feel well-informed and taken seriously.

Value for money: Many private customers compare prices and offers.

Quick response: Especially with simple products, customers often expect uncomplicated processing.

Emotions and personal desires: sympathy, security, comfort or anticipation can play a role in the purchase decision.

This doesn't mean that private customers make decisions solely based on gut feeling. They too compare offers, check facts, and calculate carefully. The specific purchasing situation is always decisive.

B2B and B2C in direct comparison

feature	B2B – Business customers	B2C – Private customers
Target audience	Companies and organizations	private individuals
Purchase motive	For example, efficiency, cost-effectiveness, or operational needs.	For example, personal needs, comfort, or leisure
decision-making process	Often multiple participants and votes	Often a person or a private household
Sales period	For larger orders, it often takes longer.	Often shorter for simple purchases
communication	Often technically and business-oriented	Often more strongly oriented towards the personal situation
Order value	Can be high in larger business relationships.	Ranges from small everyday purchases to large acquisitions.
Customer relationship	Often a long-term business relationship	Depending on the product, it may be a one-off or long-term project.
Example	Software for a company	Smartphone for private use

These differences are typical tendencies, not fixed rules. A private customer can take a long time to consider a purchase, while a company can make a buying decision within a day.

How do the sales conversations differ?

The difference is particularly evident in the way you prepare for and conduct a conversation.

Example 1: A conversation with a business customer

You want to sell a company new software.

A possible way to start a conversation would be:

"Good afternoon, thank you for taking the time for this conversation. I would first like to understand how you currently organize your workflows and where you would like to see improvements. Then we can discuss together whether our solution makes sense for your company."

This shows that you first want to understand the company's situation.

Later in the conversation you could ask:

How do you currently organize your processes?

Where do the biggest challenges arise?

What requirements must a new solution meet?

Who is involved in the decision?

By when would you like to find a solution?

You focus on the business needs and whether your offer meets the requirements.

Example 2: A conversation with a private customer

You are selling private further education.

A possible way to start a conversation would be:

"It's great that you're interested in our training program. May I briefly ask what you want to achieve professionally and what skills you already have? Then we can work together to find the course that best suits your situation."

Possible questions would be:

What do you hope to achieve with this further training?

Do you already have experience in this field?

How much time can you allocate for studying?

What is particularly important to you in a course?

Do you have any further questions about the content or the process?

Here, the customer's personal goals and possibilities are the main focus.

As you can see, in both conversations you ask questions, listen, and look for a suitable solution. The main difference lies in which requirements you focus on.

Can a company operate both B2B and B2C businesses simultaneously?

Yes, and that's actually quite common.

A company can sell its services to other companies as well as to private individuals.

Example: A further education provider offers online courses.

A private individual books a course for professional development. That's B2C.

A company books the same course for ten employees. That's B2B.

The product may be identical. Nevertheless, the discussions, the contract terms, and the requirements for the provider differ.

In a B2B context, for example, the number of participants, billing, and organizational implementation need to be clarified. In a B2C context, the focus is more on individual goals, course content, and personal learning plans.

What does that mean for your work in sales?

If you are looking for a job in sales, it is worth taking a close look at whether you will be working with business or private customers.

In B2B sales, you should be prepared to engage with companies, operational processes, and economic decisions. Thorough preparation for meetings, specialist knowledge, and structured follow-up are often particularly important.

In B2C sales, it is often important to quickly understand a customer's personal situation, explain it clearly, and answer questions understandably.

Both fields can be varied. Which one suits you better depends on your interests, your skills, and the specific job.

And one more thing: You don't automatically have to be a certain type of person to be successful in B2B or B2C. Good communication skills, active listening, and a structured approach are important in both areas.

1.6 Inside sales, field sales and telephone sales

In sales, there are different ways to get in touch with customers. Some salespeople work mainly at a desk, others visit customers in person, and still others conduct their sales conversations primarily by telephone.

The best sales approach depends on factors such as the product, the customers, and the company. Your own personality also plays a role. So you don't necessarily have to be particularly extroverted to be successful in sales.

This section introduces three common ways of organising sales and explains how they differ.

1. Inside sales – Selling from the office

In inside sales, you typically work in an office or from home. You are in contact with customers without having to visit them in person.

That doesn't mean you'll be writing emails or entering data all day, though. Inside sales often involves regular sales conversations – just conducted by phone, video conference, or in writing.

Typical tasks in inside sales

Answering customer inquiries

Create and track offers

Conducting sales conversations by phone or video
Serving existing customers
Contacting new customers
Prepare and process orders
Document customer data and conversation results
Collaborate with the field sales or other departments

A practical example

Imagine you work for a company that sells office equipment. A customer inquires online about ten new office chairs.

You call him to find out which models he needs, what his budget is, and when he'd like the delivery to take place. Then you create a suitable offer and get back in touch a few days later to confirm whether he wants to place an order.

You guided the entire sales process without ever meeting the customer in person.

Who is inside sales suitable for?

Inside sales can be a particularly good fit if you enjoy working in an organized manner, communicate reliably, and can keep track of multiple tasks.

You should also feel comfortable on the phone and not be afraid to actively approach customers. Especially when working from home, it's important to work independently and be well-organized.

Important: Inside sales doesn't automatically mean you only serve existing customers. Depending on the company, actively acquiring new customers is also part of the job.

2. The field sales – personal contact with the customer

In field sales, you are directly on-site with the customer. For example, you travel to companies, visit shops, or meet private customers at scheduled appointments.

Personal contact gives you the opportunity to get to know the customer and their situation better. You can demonstrate products, visit premises, or work out a solution together with the customer.

Typical tasks in field sales

Conducting personal sales conversations
Visit and win new customers
Presenting products or services on site
Advising customers and determining their needs
Discuss offers and finalize orders
Regularly visit existing customers
Building and maintaining business relationships
Plan visits and trips
Document the results of the discussion

A practical example

You work for a supplier of commercial coffee machines. A café is interested in a new machine.

You arrange an appointment and visit the owner on site. You observe how many guests the café has daily, how much space is available, and what requirements are placed on the machine.

Next, you present a suitable model, explain the advantages, and discuss the costs. If everything is satisfactory, the customer can order directly.

Personal contact helps you to better assess the situation and build trust.

Who is a suitable field sales role?

Field sales is often a good fit for people who enjoy being on the go, like personal contact, and can organize their work independently.

You should be reliable about keeping appointments, flexibly adapt to different conversation partners, and be able to handle rejections. Furthermore, driving is part of the daily routine for many field sales positions.

One point you shouldn't underestimate: being in sales doesn't automatically mean more freedom. You have to balance travel time, appointments, documentation, and your sales targets.

3. Telephone sales – Selling over the phone

In telephone sales, the telephone conversation is central. You contact customers or prospects, answer questions, determine their needs, and try to sell suitable offers.

Telephone sales can be part of inside sales. The terms therefore overlap. While "inside sales" describes how and from where you work, "telephone sales" primarily describes the communication channel.

Two important forms of telephone sales

Inbound – incoming calls

The customer calls themselves, for example because they are interested in a product, have received an offer, or have a question about an order.

Your task is to understand the request and, if necessary, develop a sales process from it.

Outbound – outgoing calls

You actively call customers or potential customers. This can happen, for example, if someone has requested information, an existing customer might need another product, or your company wants to acquire new business customers.

Here, it is particularly important to find a good way to start the conversation and to quickly determine whether your offer is even relevant.

A practical example

You work for a provider of software for small businesses. You call a prospective customer who has registered on the website for a product demonstration.

You briefly introduce yourself, ask about the company's current working methods, and want to know which processes should be improved.

You learn that the prospective client spends many hours manually scheduling appointments. You explain how the software can reduce this effort and arrange an online demonstration.

You didn't just promote a product, you identified a specific need and initiated the next step in the sales process.

What makes for good telephone sales?

A friendly and understandable way to start a conversation

Active listening instead of a memorized monologue

Targeted questions to identify the need

A clear explanation of the benefits

A sensible next step, for example, an offer or a follow-up appointment.

A factual response to objections and rejections

Especially on the phone, it's important not to speak too quickly and to let the customer finish speaking. Since facial expressions and body language are only partially visible, voice, word choice, and conversation style play a major role.

Caution when acquiring new customers: In Germany, advertising calls are legally restricted. In the B2C sector, prior explicit consent is generally required. Rules also apply to business customers; presumed consent must be comprehensibly justified in each specific case. A publicly available legal notice or a telephone number alone is not automatically sufficient.

4. The most important differences at a glance

feature	Internal sales	Field sales	Telephone sales
Typical workplace	Office or home office	At the customer's location and on the go	Often office or home office
Customer contact	Phone, video, email	Personal, plus digital	By phone
Main tasks	Offers, discussions, support	Visits, presentations and	Telephone needs

feature	Internal sales	Field sales	Telephone sales
	and sales	sales	assessment and sales
Travel expenses	Mostly low	Often high	Mostly low
Important skills	Organization and communication	Independence and personal presentation	Listening, questioning techniques and clear language
New customer acquisition	Depending on the position	Often an important component	Especially in outbound activities

The boundaries are not always clear. A field sales representative can perform many tasks at a desk, while an inside sales representative also conducts video meetings. In many companies, both departments work closely together.

5. Which sales method suits you best?

You don't need to know which sales method is right for you right from the start. First, consider which tasks you feel most comfortable with.

If you enjoy planning, creating offers, and supporting customers by phone or digitally, then inside sales might be a good fit for you.

If you prefer personal conversations, enjoy being on the go, and organize appointments independently, then field sales might be an interesting option.

If you enjoy talking on the phone, can quickly respond to different conversation partners, and focus on short, targeted conversations, then telephone sales could be a good option for you.

The general conditions are also important. When looking at job postings, check, for example, whether you will primarily be managing existing customers or actively acquiring new ones, whether sales targets are set, and how your salary is structured.

1.7 From first customer contact to closing the sale

A sale rarely happens just like that. In most cases, there are several steps that lead from the first contact with a potential buyer to the purchase decision. These steps constitute the so-called sales process.

Understanding how a sales process works allows you to better prepare for sales conversations, target customers more effectively, and identify the next sensible steps.

It's important to remember that not every customer goes through all the steps in the same order. Some customers already know exactly what they want to buy. Others need several conversations before they decide. Your job is to guide the customer through the process in a way that suits their individual situation.

1. What is a sales process?

The sales process describes all the steps a salesperson goes through from the first contact with a potential customer to the conclusion of the sale and often beyond.

A typical sales process consists of seven phases:

Finding and engaging customers

Establish contact

Determine needs

Present solution

Clarify questions and objections

close the sale

Customer service and relationship building

These phases often build upon each other. They help you keep track of things and avoid simply launching into a sales pitch during the conversation.

2. Phase 1: Finding and approaching customers

Before you can sell something, you need people or companies for whom your offer might be of interest.

These potential customers are also called prospects or, in sales jargon, leads. A lead is, for example, a person who is interested in a product, has made an inquiry, or has been identified as a potential customer.

Depending on the company, customer contacts are established in different ways:

Via the website or a contact form

Through recommendations from existing customers

About trade fairs and events

Through advertising and social media

Through personal contacts

Through permissible telephone or written solicitation

The key is not to indiscriminately approach as many people as possible. It's about finding suitable prospects.

Example:

You work for an accounting software provider. A small craft business could be a suitable target, as they need to manage invoices, receipts, and incoming payments.

A company that needs a completely different solution or is perfectly satisfied with its existing software may be less interesting.

The more precisely you know your target group, the more effectively you can use your sales efforts.

3. Phase 2: Establishing initial contact

The first contact often determines whether a potential customer is even willing to take a closer look at your offer.

You don't have to make a sale immediately. Your first goal is to establish a basis for conversation and find out if there's a common ground.

A good first contact is friendly, clear, and tailored to the customer's situation.

Example of an incoming contact:

A potential customer calls you because they are interested in further training.

You could say:

"Good day, it's nice to hear from you. So that I can present you with the right training program: What are your professional goals?"

You greet the customer, show interest, and start the conversation with a meaningful question.

Example of an outgoing contact:

A potential customer has requested information via your website. You call them back.

"Good day, you requested information about our training course. I wanted to briefly ask what is particularly important to you and if I can answer any questions you may have."

You make a connection to the previous contact instead of starting with a general sales pitch.

Important: When making unsolicited advertising contacts, the applicable legal regulations must be observed. In Germany, particularly strict requirements apply to telephone advertising.

4. Phase 3: Determine the customer's needs

Now begins a particularly important part of the sales process: You find out what the customer actually needs.

A common beginner mistake is to immediately list all the advantages of your product. The problem with this is that you might not yet know what's important to the customer at that point.

Instead, you should ask questions and listen carefully.

Examples of good questions are:

What is particularly important to you in a solution?

What challenge would you like to solve?

How do you currently work?

What is already working well and what would you like to improve?

By when do you need a solution?

What requirements must the offer meet?

Not every question is suitable for every conversation. Choose your questions so that you truly understand the customer's situation.

Practical example:

A customer is interested in a new laptop. You could immediately recommend an expensive model. It's better to first find out what the customer needs the device for.

Does he mainly need the laptop for emails and word processing? Does he work with demanding graphics programs? Is a low weight important to him because he travels a lot?

Only when you know that can you suggest a suitable device.

Remember: The better you understand the need, the more targeted your sales approach can be. Good salespeople don't just talk more – they ask the right questions.

5. Phase 4: Presenting the appropriate solution

After you have determined the need, you present your product or service.

The point is not to list as many features as possible. You should primarily explain the benefits for the customer.

A feature describes what a product can do or possesses. A benefit explains why that is important to the customer.

Example:

A vendor sells appointment management software.

Feature: The software sends automatic appointment reminders.

Benefits: Customers forget their appointments less often, and the company has to spend less time on inquiries and reminders.

So you are combining a specific product feature with a benefit that is relevant to the customer.

Another example from the service sector:

A company offers online training.

Feature: The learning content is available online.

Benefits: Participants can learn flexibly and better combine their further education with work and family life.

Only present benefits that are actually true. Promises you can't later keep damage trust and can have legal consequences.

6. Phase 5: Clarifying questions and objections

After you've presented your offer, you'll often receive follow-up questions. Sometimes the customer also expresses concerns.

Typical statements include:

"That's too expensive for me."

"I need to think about it some more."

“We already have a supplier.”

"I'm not sure if I really need that."

"Could you explain that to me in more detail?"

Such statements are not automatically a final rejection. They initially indicate that the customer still has questions.

It is important to remain calm and not immediately resort to justification.

Example:

The customer says: "That's too expensive for me."

An awkward reaction would be:

"But the offer is really cheap!"

That doesn't address the real reason.

A better option would be:

"I understand. May I ask what you are comparing the price to or what amount was intended for you?"

This way you can find out whether it's about the budget, a price comparison, or an as yet unrecognized benefit.

Perhaps the customer needs a cheaper option. Perhaps they don't yet understand the added value. Perhaps the offer simply doesn't fit their budget.

Not every objection can be overcome – and not every customer needs to be persuaded to buy.

In the following chapters, we will discuss objections and difficult sales situations in more detail.

7. Phase 6: Closing the Sale

Once the customer has received all the important information and the offer meets their needs, you can take the next step towards closing the deal.

A sale is completed when interest becomes a concrete purchase commitment, such as an order, a signed contract or an instruction to provide a service that is binding under the applicable requirements.

Many beginners make a mistake at this point: they keep explaining the product even though the customer is already ready to buy.

Instead, you should recognize when you can bring up the topic of ending the relationship.

Example:

The customer says:

"That sounds good. When could you deliver?"

You can reply:

"Delivery would likely be possible from next week. Would you like me to prepare the order for you?"

You address the customer's interest and take the next step concretely.

A conclusion doesn't have to be pushy. The point is to enable a clear decision.

If the customer isn't ready yet, you should find out what information or step they still need. A follow-up appointment or a scheduled callback might then be more effective than putting pressure on them.

8. Phase 7: Customer care and relationship management

The sales process doesn't always end with the order. Especially with services, long-term contracts, and business customers, after-sales support is particularly important.

This can include:

The order must be correctly forwarded to the responsible department.

Clarify any questions regarding delivery or execution

Organize a solution to any problems

Ask if the customer is satisfied.

Identify further needs when the opportunity arises.

Maintain long-term contact

Example:

A company buys new software from you. After the purchase, you shouldn't simply assume that everything will work perfectly.

The customer might need support with setup or a short training session for their staff. If they receive good support, the likelihood of customer loyalty and referrals increases.

However, it's important not to offer additional products indiscriminately. An additional product offering only makes sense if it actually meets the customer's needs.

9. What happens if a customer doesn't buy immediately?

Not every prospective customer makes a decision after the first conversation. Especially with larger purchases or long-term contracts, the decision can take several weeks or months.

That doesn't automatically mean you sold poorly.

What matters is how you deal with the situation.

If a customer needs more time, you should clarify as specifically as possible how things will proceed.

Instead of simply saying "Then get in touch when you're ready," you could ask:

"What points would you like to check before you can make a decision?"

If it makes sense, agree on a specific time for the next contact.

Also, document what was discussed. That way you won't have to start from scratch in the next conversation.

Example:

A business customer is interested in a new telephone system but needs to discuss the costs internally first. You agree that you will contact him again in a week.

In the next conversation, you can specifically ask if there are any remaining questions or if the decision has already been made.

This way, the contact remains professional without putting unnecessary pressure on the customer.

10. The sales process in practice

Let's look at all the phases using a coherent example.

You work in sales for an online academy. A prospective student wants to advance their career and is inquiring about further training.

Step 1 – Finding a prospect: The prospect requests further information via the website.

Step 2 – Establish contact: You get in touch within the bounds of permissible contact and offer a conversation.

Step 3 – Determine the need: You ask what professional goal the prospect is pursuing, what prior knowledge he has and how much time he has to learn.

Step 4 – Present the solution: You present a suitable further training course and explain how the learning content is structured and what prerequisites apply.

Step 5 – Addressing objections: The prospective student asks if they can complete the training alongside their job. You explain the actual time constraints and limitations.

Step 6 – Conclusion: The interested party decides on the offer and completes the registration.

Step 7 – Support: He receives the necessary information to get started and knows who to contact if he has any questions.

As you can see, successful sales isn't about a single convincing sentence. It's a process where every step contributes to making the right decision.

11. The most common mistakes in the sales process

Especially at the beginning, mistakes happen, and you can learn from them. You should try to avoid the following.

Selling too early: You present a solution before you know the actual need.

Talking too much: You explain the product in detail, but give the customer hardly any opportunity to express their wishes and questions.

Taking objections personally: You react irritably when the customer questions the price or is not yet convinced.

Failure to agree on a next step: The conversation ends with a non-committal "We'll be in touch," even though a concrete follow-up appointment would be useful.

Failure to follow up: You don't get back to the customer after making an offer, even though they expect a response or further contact was agreed upon.

Putting too much pressure on: You try to push the customer to make a decision even though important questions are still unanswered or the offer doesn't suit them.

A good sales process helps you avoid such mistakes. It provides guidance without requiring you to conduct every conversation according to a rigid template.

1.8 Typical misunderstandings about sales

When people hear the word "sales," many immediately think of salespeople who try to push products on customers, constantly make phone calls, or persuade others until they finally buy something. Perhaps you've had similar experiences yourself.

There are indeed different ways of working in sales. Some are professional and customer-oriented, others unfortunately less so. This often leads to misconceptions about what sales actually means and what skills are required.

Especially if you're new to this field or considering a career change, you should be aware of these misconceptions. They will help you assess sales more realistically and develop your own approach.

1. Misconception: "Sales means trying to sell something to people."

That is probably one of the most well-known prejudices.

Many people associate selling with manipulating someone until they buy a product – even if they don't need it at all.

Professional sales work differently. It's about finding out if an offer suits the customer, what benefits it offers, and whether the customer wants to choose it.

Of course, convincing people of an offer is part of sales. The crucial difference lies in how this is done.

A bad example:

A salesperson knows that a customer only needs simple software. Nevertheless, he tries to sell him the most expensive version because he receives a higher commission that way.

A good example:

A salesperson first asks which functions the customer needs. Then they recommend the appropriate version and openly explain which additional functions the more expensive option offers and whether these are actually useful for the customer.

The second salesperson takes the customer seriously and creates a basis for a long-term business relationship.

Here's what you should take away: Persuasion doesn't mean exerting pressure. You explain the benefits of an offer and support the customer in making an informed decision.

2. Misconception: "Anyone who can speak well is automatically a good salesperson."

Of course, being able to speak clearly and persuasively helps. Nevertheless, public speaking skills alone are no guarantee of sales success.

Some people are excellent presenters, but talk so much that they hardly learn anything about their conversation partner.

Good salespeople, on the other hand, excel at one thing above all: listening.

They ask questions, recognize connections, and adapt their arguments to the customer's situation.

A real-world example:

A customer is interested in further training. The salesperson explains all the content, benefits, and additional services to him for ten minutes.

The customer remains uncertain, however, because he actually wants to know whether he can complete the further training alongside his job.

Another salesperson first asks about the client's professional situation and available time. This allows them to address the crucial question directly.

Which salesperson did a better job here? Not necessarily the one who said more, but the one who understood what the customer wanted.

Remember: In sales, it's not about talking as much as possible. What's crucial is addressing the right things at the right time.

3. Misconception: "You have to be a born salesman."

Perhaps you know people who seem to effortlessly make contacts, speak freely, and inspire others with their ideas.

This quickly creates the impression that successful salespeople must possess a special talent.

Certain qualities can indeed be helpful. These include, for example, openness, curiosity, patience, and communication skills. But much of what is important in sales can be learned and practiced.

This includes:

Prepare conversations in a structured way

Ask the right questions

Identifying customer needs

Explain offers in an understandable way

Handling objections

How to conclude sales conversations effectively

After discussions, plan the next steps

Even people who are rather quiet or reserved can be successful in sales. They may listen particularly attentively, work meticulously, and build relationships in their own style.

So you don't suddenly have to develop a completely different personality.

An example:

A new employee is initially nervous when she has to call customers. She prepares for her calls, writes down important questions, and practices typical conversation scenarios.

Over time, she gains confidence. She doesn't have to memorize every conversation, but can react with increasing flexibility.

This shows that security often comes from experience and preparation – not solely from talent.

4. Misconception: "A good salesperson can sell any product."

Perhaps you've heard the saying that a good salesman could even sell ice cream to Eskimos.

The saying is meant to illustrate how persuasive someone can be. At the same time, it conveys a problematic idea: that only salesmanship matters, regardless of whether the offer makes sense.

In reality, sales success depends on several factors.

These include, among others:

The quality of the product or service

The customer's actual need

The price and the price-performance ratio

The competition

The time

The consultation and service

The credibility of the provider

A good salesperson cannot permanently transform an unsuitable product into a suitable solution through skillful words.

Example:

A customer needs an inexpensive entry-level device for basic office work. You want to sell him a particularly powerful and expensive device.

Even if you convincingly explain the advantages, the offer may not fit their needs or budget.

A professional salesperson will recognize this and recommend a different model if necessary.

Important: Not every prospect becomes a customer. And not every product is right for every customer. This isn't a personal failure; it's simply part of sales.

5. Misconception: "Those who sell well must be particularly persistent."

Persistence is frequently cited as an important quality in sales. This is generally understandable: not every customer makes a decision after the first conversation, and some offers require multiple touchpoints.

However, problems arise when persistence is confused with constant questioning, pressure, or ignoring a clear "no".

Professional follow-up means establishing further contact based on an agreed-upon or objectively justified reason.

A good example:

You sent a customer a quote. You agreed that you would get back to them after three days.

You call at the agreed time and ask if there are any further questions.

A bad example:

A potential buyer clearly rejects the offer. Nevertheless, you call him daily and try to change his mind.

The second approach appears intrusive and can destroy trust. Depending on the nature of the contact, legal boundaries may also be crossed.

Remember: Remain professional, but respect the customer's decision. Professional sales require persistence – not harassment.

6. Misconception: "The customer is always right."

You may have heard this statement many times before, especially in customer service.

Of course, a customer should be treated with respect. Their wishes, questions, and complaints must be taken seriously. However, this does not mean that every statement made by the customer is factually correct or that every demand must be met.

A professional salesperson remains friendly, explains things clearly, and adheres to the company's rules.

Example:

A customer demands a 40 percent discount, even though the company cannot offer that price.

You don't have to agree immediately just to get the job. You can explain what pricing options are possible and, if necessary, offer a cheaper alternative.

Another example: A customer expects a product feature that the product does not actually possess.

It would be wrong to promise this feature simply to close the sale.

This means: The customer deserves respect. But respect doesn't mean fulfilling every demand or making false statements.

7. Misconception: "A 'no' means I sold poorly."

A customer rejects your offer – and immediately you wonder what you did wrong.

Beginners often take rejections personally. However, there are many reasons why a customer might not buy.

Perhaps he doesn't currently have a budget. Perhaps he doesn't need the product after all. Perhaps he has already decided on another supplier or still needs to clarify something internally.

Not all of these reasons can be changed through a better sales pitch.

Nevertheless, you can learn from a rejection.

After the conversation, ask yourself:

Have I understood the need correctly?

Have I explained the key advantages?

Were there any important questions still unanswered?

Did I explain the price or the requirements clearly?

Did the customer give a specific reason for their decision?

If the situation is appropriate, you can politely ask the customer what ultimately spoke against the offer.

Example:

A potential customer decides against your service because they cannot currently afford it.

That doesn't automatically mean you gave bad advice. Perhaps your offer was suitable, but the timing was unfavorable.

Important: A rejection can be a reason to review your approach. However, it is not automatic proof of a mistake.

8. Misconception: "In sales, only revenue counts."

Revenue is an important key performance indicator for many sales departments. After all, companies need to operate profitably.

Nevertheless, revenue alone is not a complete measure of good sales performance.

For example, if you conclude many contracts but provide customers with incorrect information or ignore their needs, complaints, cancellations, or terminations may follow later.

Other factors also play a role:

Customer satisfaction

Quality of advice

Sales conversion rate

Amount of the average order value

Customer loyalty

Repeat purchases

Number and quality of new customer contacts

Compliance with legal and internal requirements

Which key performance indicators (KPIs) are important depends on the company and the sales model.

Example:

Salesperson A closes 20 contracts in one month. Many customers cancel shortly afterwards because the offer did not meet their needs.

Salesperson B closes 15 contracts. Most of his customers remain loyal and recommend the company to others.

The sheer number of deals doesn't tell the whole story. In the long run, the quality of customer relationships can make a significant difference.

Note: Successful sales combine economic results with good customer service and sustainable business relationships.

9. Misconception: "Sales means constantly having to acquire new customers."

Acquiring new customers is an important part of the work in many sales offices. However, it is not the only task in sales.

Depending on your position, your focus can look very different.

Some employees acquire new customers and establish initial contact. Others manage existing customers, prepare offers, handle contract renewals, or develop additional solutions for existing business relationships.

Some companies divide these tasks among different positions. In smaller businesses, however, one person may be responsible for almost the entire sales process.

Example:

You work for a software provider. A colleague acquires new companies as clients. You support these companies after the contract is signed, answer their questions, and identify when additional features might be beneficial.

Your work is also part of sales, although you don't have to constantly approach new customers.

Therefore, you should pay close attention to the job description when applying for a position. Terms like "Sales", "Account Management", "Inside Sales", or "New Customer Acquisition" can have different focuses.

10. Misconception: "Sales is insecure and you only earn money through commission."

There are different compensation models in sales. Not every position is structured the same way.

For example, the following are possible:

A fixed monthly salary

A basic salary plus commission

A basic salary plus bonus payments

A predominantly variable remuneration

Self-employed work on a commission or fee basis

Which option is right for you depends on the position, the company, and the contract model.

When looking for a sales position, you should not only pay attention to the potential income, but also to the conditions behind it.

For example, ask:

What is the fixed basic salary?

How is the commission calculated?

Are there realistic and comprehensible targets?

When will the commission be paid out?

What happens in the case of cancellations or contract terminations?

How will the onboarding process and the first few months be structured?

A stated "income of up to 6,000 euros" says little about what you can actually earn regularly.

Especially when working independently in sales, you should also clarify who bears the costs, how the cooperation is contractually regulated, and whether you have to assume economic risks yourself.

Important: Don't be swayed by promises of high earnings alone. Always check how the compensation is structured and what requirements must be met.

11. Misconception: "Sales is only for extroverted people."

Extroverted people often feel comfortable making new contacts and spontaneously starting conversations. This can be helpful in sales.

But quieter people can also become excellent sales representatives.

What matters is not how loud or talkative you are, but how you communicate and work with people.

Calmer people may possess the following strengths:

They are listening attentively.

They prepare for conversations carefully.

They work in a structured manner.

They take the time to understand the connections.

They can answer questions patiently and objectively.

Of course, there are also challenges. For example, anyone who has great inhibitions about making phone calls should specifically practice this if telephone sales are part of their job.

However, you don't have to try to be particularly loud, energetic, or aggressive if that doesn't suit your personality.

Remember: There are different ways to sell successfully. Find a professional style that suits you and also meets the requirements of the specific position.

12. How you should deal with these misunderstandings

If you want to work in sales, it's helpful to keep a few basic principles in mind:

Be curious, not pushy. Ask questions before presenting solutions.

Be persuasive, not manipulative. Explain the actual benefits and don't withhold any important information.

Be reliable, not stubborn at all costs. Agreed-upon feedback is important, but a clear "no" must be respected.

Be open to learning instead of being self-critical after every rejection. Analyze your conversations without taking every failure personally.

Be customer-oriented and profitable at the same time. Good sales work should help the customer and simultaneously contribute to the company's success.

Sales is not a magic trick, nor is it a special art reserved for only a select few. It is a professional activity that combines communication, expertise, organization, and experience.

The more you learn and gain practical experience, the more confident you will become in dealing with different customers and situations.

You have now learned the basics of sales: its tasks, the different target groups and sales methods, the process of a sales process and typical misunderstandings about the profession.

If you take away only one thought from Chapter 1, let it be this:

Successful sales don't begin with selling, but with understanding. Those who know their customers and their needs can offer suitable solutions, communicate professionally, and build trust in the long term.

The next chapter will discuss the roles and tasks involved in sales and how the various activities differ in everyday work.

Chapter 2 Sales roles and responsibilities

2.1 What sales positions exist

There are many different job profiles in sales. Some employees talk to potential customers on the phone every day, others create offers, manage existing business partners, or conduct face-to-face sales meetings. Still others coordinate appointments, analyze sales figures, or provide behind-the-scenes support to the entire sales team.

This means that someone who wants to work in sales doesn't automatically have to be constantly on the phone, visiting customers, or actively selling products. Depending on the position, the tasks, responsibilities, and requirements vary considerably.

Especially for those starting their careers or changing careers, it is therefore important to be familiar with the different sales positions. This makes it easier to assess which job best suits their own skills, interests, and career goals.

Sales representative – the general term

The term "sales representative" is a general term for many activities in sales and customer service. The specific tasks involved depend on the company, the industry, and the specific job description.

For example, a sales representative can:

gain new customers

Serving existing customers,

Identify customer needs,

present products or services,

Create and track offers,

Discuss prices and conditions,

Prepare or execute sales deals,

Document customer contacts.

Not every sales position encompasses all these tasks. In some companies, one employee handles the entire sales process. In others, the tasks are distributed among several people.

Practical example:

A company sells software to craft businesses. A sales representative contacts interested businesses, determines their requirements, presents the software, and guides the customer until they make a decision. After the contract is signed, another employee may take over the implementation and support.

In a smaller company, the same person can accompany the customer from the initial consultation to long-term support.

Inside Sales

The sales support team primarily works from the office or from home. Direct customer contact mainly takes place via telephone, email, video conferences, or digital systems.

Typical tasks include:

Processing customer inquiries,

Create and send offers

Record and coordinate orders,

Coordinate delivery dates and answer any questions,

Providing customer support via telephone and in writing,

Supporting field sales representatives

Track sales opportunities.

Depending on the company, the inside sales team may also actively sell and close deals. In other companies, the focus is more on organization and customer service.

Practical example: A customer wants to set up ten new office workstations. The sales support team clarifies the requirements, prepares a quotation, agrees on the delivery terms, and oversees the order.

Suitable for: People who work in a structured manner, communicate reliably and can coordinate business processes.

Field sales force

The field sales force provides personal, on-site support to customers. Employees are frequently on the road, visiting companies, business partners, or sales outlets, for example.

Typical tasks include:

conduct personal customer appointments,

gain new customers

visit existing customers

presenting products and services,

develop individual solutions

Accompanying offers and contract negotiations,

Achieve sales targets

Gather market and competitive information.

Field sales are particularly common in industries where personal consultation, product demonstrations, or long-term business relationships play an important role.

Practical example: A sales representative for a beverage manufacturer visits restaurants, discusses their needs, and presents new products. He then agrees on the terms and manages the ongoing business relationship.

Suitable for: People who enjoy working personally with customers, planning independently, and taking on regular off-site appointments.

Telephone sales

In telephone sales, the majority of customer communication takes place over the phone. The goal can be to acquire new customers, schedule appointments, follow up on offers, or directly sell products and services.

Typical tasks include:

contact potential customers,

handle incoming calls,

Determine customer needs

explain products or services,

Answering follow-up questions

Schedule appointments for the field sales,

Conduct sales transactions by telephone.

In telephone sales, a distinction is often made between two forms:

Inbound: Customers call themselves, for example due to an inquiry or a request for a quote.

Outbound: Employees actively call customers or potential customers.

Legal requirements apply to advertising calls. In particular, prior express consent is generally required for consumer advertising. Separate requirements apply to business customers. The legality of such calls must be verified before contact is made.

Practical example: A prospective customer has requested information about a software program online. An employee calls him back, answers his questions, and schedules a consultation appointment.

Suitable for: People who can express themselves well verbally, listen attentively and remain focused even in recurring conversation situations.

New customer acquisition

New customer acquisition focuses on gaining new customers. Depending on the company, this is done by telephone, in writing, digitally, through events, or through personal contacts.

Typical tasks include:

research potential customers,

Identify suitable target groups,

Check contact options,

establish permissible initial contacts,

Qualifying interested parties,

Schedule appointments,

conduct initial discussions,

Sales opportunities are passed on to other sales staff.

Chapter 14 Final test of sales knowledge

This test is for self-assessment and is not a government or professional examination. The 32 questions are divided into eight topic areas. There is exactly one correct answer for each question. Write down your answers before reading the solutions. The numerical examples are explicitly based on the model assumptions stated in each case.

14.1 Fundamentals of Sales

Question 1

What is included in the sales function?
A. Only signing a contract
B. Clarifying needs, presenting suitable offers and maintaining customer relationships
C. Only designing advertisements

Question 2

What should guide a suitable recommendation?
A. The highest selling price
B. The salesperson’s favourite product
C. The customer’s verified needs and circumstances

Question 3

Which statement about revenue is correct?
A. Revenue and profit are the same
B. Revenue alone does not show how much profit has been made
C. Revenue already accounts for every cost

Question 4

An offer clearly does not meet the customer’s needs. What is an appropriate response?
A. Explain the mismatch openly and advise against buying if appropriate
B. Conceal the mismatch
C. Use time pressure to force a sale

14.2 Job profiles and organization

Question 5

Which task is often part of inside sales?
A. Only developing new products
B. Only conducting job interviews
C. Preparing quotations and coordinating customer enquiries

Question 6

Which statement about responsibilities is correct?
A. They are identical in every business
B. They must be clarified in the particular organisation
C. They can be ignored during a handover

Question 7

A promised reply will be delayed. What should you do?
A. Inform the customer early and agree on a realistic next step
B. Wait until the customer complains
C. Mark the task as completed

Question 8

You do not know whether a technical requirement is met. What should you say?
A. It always works
B. You have to know that yourself
C. I do not yet know for certain and will check with the relevant specialist

14.3 Customer needs and communication

Question 9

Which is an open question?
A. Would you like Package A?
B. How do you currently handle customer enquiries?
C. Should I call tomorrow?

Question 10

A customer crosses their arms. What can you conclude?
A. Nothing certain about their intention to buy
B. They are definitely rejecting the offer
C. They want a discount

Question 11

Which action supports active listening?
A. Replace the customer’s answer with your own assumptions
B. Write the next quotation while the customer is answering
C. Summarise what you have understood and ask the customer to confirm it

Question 12

What is a lead?
A. An order that is already guaranteed to be won
B. A potential contact or prospect who still needs to be qualified
C. A binding payment

14.4 Presentations and customer benefits

Question 13

Which statement connects a feature with a potential customer benefit?
A. Automatic export can reduce manual data transfers provided your systems are compatible
B. Our software has a lot of features
C. This is the best solution for everyone

Question 14

Which pricing information provides the most useful basis for a decision?
A. A low monthly price without information about the contract duration
B. A discount without a comparison basis
C. An overview of the service scope, one-off and recurring costs, and relevant conditions

Question 15

What distinguishes an assumed benefit from a verified result?
A. Nothing
B. An assumption must first be checked against the actual circumstances
C. An assumption is always more accurate

Question 16

How should you deal with a competing offer?
A. Compare it objectively using comparable criteria and verified information
B. Make unsupported claims about the competing provider
C. Ignore the scope of services

14.5 Preparing and conducting the conversation

Question 17

What makes a useful sales conversation goal?
A. The customer must buy regardless of the circumstances
B. A presentation that is as long as possible
C. An observable outcome appropriate to the situation

Question 18

When should you present a solution?
A. Always before asking the first question
B. When the relevant need has been sufficiently understood and confirmed
C. Only after a payment

Question 19

What is the purpose of a conversation guide?
A. It provides a structure and is adapted to the conversation
B. It replaces listening
C. It prohibits follow-up questions

Question 20

Which agreement is sufficiently specific?
A. We will be in touch
B. I will contact you sometime
C. I will send the agreed overview by Tuesday and we will discuss outstanding questions on Friday at ten o’clock

14.6 Objections and closing a sale

Question 21

A customer says the price is too high. What is a suitable first step?
A. Immediately cut the price in half
B. Ask what their assessment is based on
C. Interrupt the customer

Question 22

Which is reliable evidence of an order?
A. An actually binding order that meets the applicable requirements
B. That sounds interesting
C. Please send me some information first

Question 23

The customer explicitly refuses further contact. What should you do?
A. Call again from another number
B. Immediately send several more offers
C. Respect the refusal and document it appropriately

Question 24

What should be clarified before closing a sale?
A. Only the desired commission
B. The service, price, conditions, outstanding questions and any required form
C. Only the colour of the signature

14.7 Prospecting customer care and follow up

Question 25

A business email address is publicly available online. What follows from this?
A. It does not provide blanket permission to send marketing emails
B. Every marketing email is permitted
C. It replaces a withdrawal of consent

Question 26

A customer recommends an acquaintance. Which statement is correct?
A. The recommendation automatically permits every marketing channel
B. The acquaintance has to buy
C. The recommendation does not replace the required check that the contact is permissible

Question 27

What takes priority when a justified complaint remains unresolved?
A. Ask for a positive review
B. Clarify the facts and work on an appropriate solution
C. Sell an additional product

Question 28

What is customer-focused cross-selling?
A. Offering an addition that meets the customer’s actual needs
B. Selling every available additional service
C. Always ruling out the less expensive offer

14.8 CRM Key Performance Indicators and Sales Organization

Question 29

Model assumption: 80 contact attempts produce 32 actual contacts. What is the contact rate?
A. 25 per cent
B. 60 per cent
C. 40 per cent

Question 30

Model assumption: Of 20 decided sales opportunities 12 are won. What is the win rate for this group?
A. 40 per cent
B. 60 per cent
C. 12 per cent

Question 31

Model assumption: An opportunity is worth 8000 euros with an estimated 50 per cent probability of success. What does its weighted value of 4000 euros represent?
A. A model-dependent calculation that is not a guaranteed order
B. Revenue that has already been paid
C. A legally binding customer commitment

Question 32

Which CRM note is most useful?

A. Nice customer call later

B. The customer is difficult

C. Record the identified need, outstanding questions, agreed task, responsible person and deadline factually

14.9 Scoring answers and learning recommendations

Award one point for each correct answer. A maximum of 32 points is possible. The following classification is an editorial learning aid and not a scientifically validated proof of competence: 28 to 32 points indicate a good result in this self-test; with 22 to 27 points, you should specifically review the topics with errors; with 0 to 21 points, you should rework the relevant basics. A good test result does not replace practical observation or specific professional qualifications.

Question 1 Answer B

The sales function covers several stages of customer acquisition and care. Marketing and customer service may overlap with these activities.

Question 2 Answer C

The recommended solution must match the customer’s needs, conditions and limitations.

Question 3 Answer B

Assessing profit requires the relevant costs and other accounting factors to be taken into account.

Question 4 Answer A

Sound advice also identifies limitations and a lack of suitability.

Question 5 Answer C

The allocation of work depends on the company. Preparing quotations and coordinating enquiries are often part of inside sales.

Question 6 Answer B

Clear responsibilities prevent enquiries and commitments from being left unattended.

Question 7 Answer A

Reliability includes communicating delays openly.

Question 8 Answer C

Uncertainty must be disclosed. An unchecked promise is not a reliable professional answer.

Question 9 Answer B

An open question invites the customer to describe the situation without supplying the answer in advance.

Question 10 Answer A

A single body-language signal can have several explanations. Ask a factual question if something remains unclear.

Question 11 Answer C

A summary checked with the customer helps identify misunderstandings.

Question 12 Answer B

A lead is not yet an order. Need, suitability and the next step still have to be clarified.

Question 13 Answer A

The statement identifies a benefit and a condition rather than claiming universal superiority.

Question 14 Answer C

The total cost and the associated scope of services must be clear.

Question 15 Answer B

Potential benefits must not be presented as customer results that have already been achieved.

Question 16 Answer A

Comparisons need a common basis. Information that is not known must remain open.

Question 17 Answer C

A suitable goal may be clarifying the need or agreeing a follow-up appointment.

Question 18 Answer B

Without a needs assessment you risk presenting arguments that do not address the customer’s situation.

Question 19 Answer A

The guide supports a structure but must not override the actual course of the conversation.

Question 20 Answer C

The task, responsible person and deadline are clear. The commitment must be realistic.

Question 21 Answer B

Price concerns may relate to budget, competing offers or an unclear benefit.

Question 22 Answer A

Interest or a request for information does not by itself constitute an order.

Question 23 Answer C

A clearly expressed refusal must be respected in marketing contact. Internal suppression procedures must work reliably.

Question 24 Answer B

Closing a sale requires a sound shared basis and compliance with the requirements applicable to the transaction.

Question 25 Answer A

Publication of contact details does not provide blanket permission to advertise. The requirements for the particular channel must be checked.

Question 26 Answer C

A referral alone is not blanket consent from the person being referred.

Question 27 Answer B

A complaint first requires factual handling and clear responsibility.

Question 28 Answer A

An additional offer needs a clear benefit that matches the customer’s needs.

Question 29 Answer C

32 divided by 80 multiplied by 100 equals 40 per cent. Both figures must relate to the same defined period.

Question 30 Answer B

12 divided by 20 multiplied by 100 equals 60 per cent. This group contains only opportunities for which a decision has been reached.