

SALES CLOSING TANZANIA

CRM • Negotiation • Follow-up



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The Tanzania Sales Closing Playbook

FREE COMPANION EBOOK

HumanValue Consulting Limited
JobsTanzania Learning Center
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Practise ethical selling with a fictional JobsTanzania Commercial CRM case, worked TZS examples, a web lab and reusable templates.

Your practical starting point

Use this guide to build a first draft before taking the full course. Work through one chapter at a time. Write your answers before reading the worked answer. Use fictional information for every exercise.

- 1. Find the right demand**
- 2. Build a clean Commercial CRM pipeline**
- 3. Turn discovery into a proposal**
- 4. Handle objections and negotiate**
- 5. Close, follow up and verify payment**
- 6. Report performance and transfer to open-source CRM**

The full course adds the web practice lab, structured exercises and an editable template. Price: TZS 50,000. [View the course.](#)

01 / Find the right demand

Start with a specific customer problem. In this fictional JobsTanzania Commercial CRM case, Mwangaza Traders needs training for four sales staff. Ask what happens today, what improvement matters, who approves, what budget is available and when a decision is needed. Do not treat a social-media reaction as permission for repeated sales messages. Ask the prospect for the preferred language and channel; use clear English or Kiswahili and confirm the next contact time.

Attract suitable prospects with a useful checklist, a short demonstration and an honest case example. Offer one clear next step: a discovery call. Record the source as referral, website enquiry, event or campaign. Measure qualified conversations per source before increasing advertising spend. Never promise employment, guaranteed revenue or results you cannot substantiate.

Practice: Write a two-sentence invitation for Mwangaza and five discovery questions. The buyer has not confirmed the approver or budget. Which stage is justified?

Worked answer: Keep the enquiry New until need, decision process and timing are understood. Example: “We help teams organise follow-ups and explain proposals clearly. Would a 15-minute discussion about your team’s sales process be useful?” Ask about missed follow-ups, desired improvement, budget range, approval owner and target date.

Your notes / action for this week

02 / Build a clean Commercial CRM pipeline

Use the training lab, not the live admin CRM. The simulated workspace follows the Commercial Growth Command Center: Sales pipeline, Lead inbox, Orders & payments, Acquisition channels and Recent activity. Use New, Qualified, Proposal, Negotiation, Won and Lost stages. Give each opportunity one owner, a product category, estimated TZS value, source, next action and due date. Keep a contact separate from an opportunity so one organisation can have more than one buying need.

Stage evidence matters. Qualified requires a credible need and buying route; Proposal requires a documented offer; Negotiation requires an active discussion of terms. Won means accepted commercial scope, while payment verification requires separate settlement evidence. Remove duplicates by checking organisation and enquiry context before merging. Preserve a short activity history rather than rewriting it to make progress look better.

Practice: In the lab choose Mwangaza Traders, set owner to Training adviser, value TZS 200,000, stage Qualified, and a dated action to confirm the decision-maker. Save, filter Qualified, then export your simulated pipeline.

Worked answer: Four places at a fictional training price of TZS 50,000 produce an estimated TZS 200,000 opportunity. Saving the deal changes pipeline value; it does not create an order or prove cash received. The exported row should retain owner, stage and next action.

Your notes / action for this week

03 / Turn discovery into a proposal

Summarise the customer problem in the customer's own words before proposing a solution. Separate the problem, deliverables, assumptions, exclusions, timetable, total TZS price and acceptance step. For a Tanzanian SME, ask whether a quotation, purchase order, procurement review or management approval is needed. State how taxes will be handled only after checking the seller's actual tax status; never add a fabricated tax registration number.

For the fictional Mwangaza offer, quote four self-paced training places at TZS 50,000 each, total TZS 200,000, with access and support boundaries stated. Explain the value through a measurable process improvement such as complete follow-up records, rather than a guaranteed sales increase. Ask the buyer to confirm scope and approval timing. Log the proposal version and the agreed follow-up date.

Practice: Draft a one-page proposal and use the quote calculator in the lab for four places. A buyer asks for five places at the same total price. What changes?

Worked answer: Five places at TZS 50,000 would be TZS 250,000. Keeping the total at TZS 200,000 implies a TZS 50,000 concession, or 20% off that five-place total. Obtain authorised approval or reduce scope; do not quietly change the unit price.

Your notes / action for this week

04 / Handle objections and negotiate

Listen, acknowledge, clarify, respond with evidence and confirm the next step. “Too expensive” may mean missing value, limited cash, a cheaper competitor or no authority to buy. Ask which issue is most important before discounting. Use respectful questions: “Ni sehemu gani ya gharama au matokeo ungependa tufafanue?” Avoid false deadlines, pressure, bribes or claims that the buyer must purchase immediately.

Set a negotiation boundary before the call. Trade a concession for a specific reciprocal commitment, such as a smaller scope, approved schedule or a documented volume purchase. Never offer credit or a payment arrangement you are not authorised to approve. Compare alternatives on deliverables, access, implementation effort and total cost, not price alone. Log why a deal was lost without insulting the prospect.

Practice: A buyer requests a 25% discount on TZS 200,000 while your authorised ceiling is 10%. Write a response and calculate the lowest authorised total.

Worked answer: The authorised discount is TZS 20,000 and the lowest total is TZS 180,000. Respond: “I can discuss an approved option at TZS 180,000 for the stated scope. If your budget is lower, let us review the number of places or scope.” Escalate any larger concession before promising it.

Your notes / action for this week

05 / Close, follow up and verify payment

A close is a clear agreement, not a pressure technique. Ask: "If the scope and total meet your needs, shall we confirm the order and next steps?" Record acceptance, billing details, service scope and who will deliver. Use the approved JobsTanzania checkout or invoicing process. A screenshot of a transfer or a verbal promise is a lead for reconciliation, not proof of settlement.

A useful follow-up refers to the agreed need, adds one piece of relevant value and asks a simple question. Example: "As agreed, here is the four-person training outline. Is manager approval complete, or is there a question we can resolve before Friday?" Set a reasonable cadence and honour a request to stop. After confirmation, hand over the agreed scope, customer contact preference and delivery date, then check that access works.

Practice: In the lab mark the accepted fictional proposal Won. Check the dashboard before using the separate simulated payment-verification control. What changes?

Worked answer: Won opportunity value increases, but verified payment remains zero until the simulated payment is separately verified. After verification, the paid amount increases. In real work, only an authorised reconciliation process may verify a transaction; never use the training controls in production.

Your notes / action for this week

06 / Report performance and transfer to open-source CRM

Use three different measures: open pipeline is potential business, won value is accepted business, and verified payments are settlement evidence. Win rate is won divided by won plus lost; exclude still-open opportunities. Review overdue follow-ups, missing owners, stage ageing and source quality weekly. A large pipeline with no next actions is a warning, not success.

The same concepts transfer to open-source tools. In EspoCRM, qualify a lead and convert it to the appropriate account, contact and opportunity. In Frappe CRM, a qualified lead can become a deal with an owner, value, stage and expected close date. Start in an authorised test workspace with fictional records. Hosting, backups, administration and optional extensions can cost money even where core software is open source. Read the official documentation before import or configuration.

Capstone: Triage all six fictional lab records, fix missing next actions, prepare the four-place proposal, explain one lost deal, and export a pipeline report. Self-score 20 points each for qualification, CRM hygiene, proposal, ethical negotiation and payment distinction.

Worked answer: A satisfactory portfolio scores at least 80/100 and contains a discovery note, complete opportunity row, proposal, follow-up draft and a report separating pipeline, Won and paid totals. For 3 wins and 2 losses the win rate is 60%. Keep training records fictional and label every price in the case as illustrative.

Your notes / action for this week

Continue your learning

HumanValue Consulting Limited presents Sales Closing in Tanzania with Commercial CRM on JobsTanzania Learning Center. Practise with the simulated lab and build a portfolio of your own work. TZS 50,000 per learner.

<https://jobstanzania.co.tz/training/sales-closing-tanzania-crm>

Official references

[EspoCRM sales management](#)

[Frappe CRM leads](#)

[Frappe CRM deals](#)

Sources checked 25 October 2026. This independent HumanValue educational product is not endorsed by TRA or CRM software vendors. Rules and interfaces can change. No employment, income or tax outcome is guaranteed.