



# 10 Best Practices for Sales Professionals

based on the FIDI PCGs



October 2025

# Top 10 Best Practices for Sales Professionals

## Your checklist for professional, client-focused sales, based on FIDI's Professional Cooperation Guidelines (PCGs)

As the first contact with the client, you set the tone for the entire moving experience. Accurate information, clear communication, and realistic expectations are the foundation of quality service. Follow these practical steps to ensure every offer you craft reflects FIDI's standards and builds lasting client trust.

### Before the survey



#### **1. Respond to enquiries quickly**

Acknowledge every new lead or agent request within one working day; responsiveness shows reliability from the start.



#### **2. Prepare thoroughly for each pre-move survey**

Review all information from the booking agent, understand client needs and restrictions, and check for any special items or access challenges before visiting the residence.



#### **3. Gather complete, accurate information**

Use standard templates and photos to record details such as residence type, access conditions, volume estimates, and special packing needs. Incomplete data leads to inaccurate quotes and future disputes.



#### **4. Explain the process and manage expectations**

Take time to clarify the process of an internal move, what the service includes and excludes, what documents will be required, and how customs or delivery timelines may affect the move. Clients value transparency more than speed.

### During quotation



#### **5. Ensure estimates are realistic**

Double-check that volumes, packing materials, and service times are achievable. Over- or under-estimating damages credibility and profitability.



#### **6. Highlight all inclusions, exclusions, and potential extras**

Quote clearly for all known services and specify what could incur additional charges, such as difficult access, parking permits, or demurrage.



#### **7. Collaborate closely with operations and the move coordinator.**

Verify that proposed schedules, resources, and packing plans align with actual capacity before sending the quotation to the client or booker.



#### **8. Submit the quotation on time**

Follow PCG and FIDI-FAIM timeframes: send the quotation and pre-move survey report within three working days of the visit, unless otherwise agreed.

## After closing the deal



### **9. Communicate authorisations and hand-over details clearly**

Once the client approves the quote, confirm in writing what has been authorised, what remains pending, and pass all details promptly to the operations and coordination teams.



### **10. Learn from feedback and follow-up**

Review completed moves with the team to understand where estimates, communication, or expectations fell short. Continuous improvement strengthens both client relationships and profitability.

As a sales professional, your accuracy and communication shape every move that follows. By setting clear expectations and building transparent relationships, you help ensure a smooth process for clients, crews, and partner agents — and uphold FIDI's reputation for quality worldwide.

**The FIDI Academy** has a wide range of trainings catered specifically for salespeople and the relocation industry, helping you to get ahead in your relocation career.

Contact [academy@fidi.org](mailto:academy@fidi.org) for more information.

## About the FIDI Professional Cooperation Guidelines (PCGs)

The **FIDI Professional Cooperation Guidelines (PCGs)** set the benchmark for quality service and cooperation in the international moving industry. Recognised worldwide, they define the standards, processes and timeframes that ensure smooth collaboration between partners and consistent, professional service for clients.

Updated regularly to reflect real-world best practices, the PCGs are both a reference and a practical tool for daily operations.

Access the full document on [FIDINET](#) (members-only section) or contact us at [contact@fidi.org](mailto:contact@fidi.org) for more information.

## About FIDI Global Alliance

**FIDI Global Alliance** is the world's largest network of quality-certified international moving and relocation companies. Every FIDI Affiliate meets the FIDI-FAIM or FIDI-DSP Quality Standards, the most rigorous certifications in the industry. Through shared standards, training, and best practices, FIDI helps its members deliver professional, compliant, and sustainable moving services around the world.

Learn more at [www.fidi.org](http://www.fidi.org) or reach out to us at [contact@fidi.org](mailto:contact@fidi.org)