

SQA Advanced Unit specification: general information

Unit title: Sales Planning

Unit code: HR30 48

Superclass: BE

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Unit purpose

The Unit is designed to provide candidates with knowledge and understanding of the Sales Planning Process, including its role and function within an organisation's marketing activities. It also aims to develop the skills needed to produce a sales plan.

On completion of the Unit the candidate should be able to:

- 1 Evaluate the role of sales planning as part of the marketing activities of an organisation.
- 2 Produce a sales plan for an organisation.

Recommended prior knowledge and skills

Although this is a stand-alone Unit, it would be expected that candidates would have achieved introductory Units in marketing, selling and promotion or have relevant experience before undertaking this Unit.

Credit points and level

1 SQA Credit at SCQF level 8: (8 SCQF credit points at SCQF level 8*)

**SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from National 1 to Doctorates.*

Core Skills

There are opportunities to develop the Core Skills of *Numeracy* at SCQF level 6 and *Communication* at SCQF level 6; *Problem Solving* at SCQF level 6 and *Working with Others* at SCQF level 6 in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

Context for delivery

If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

Assessment

Assessment for this Unit can be done per Outcome or integrated for a more holistic approach. If a holistic approach is adopted, Evidence Requirements for both Outcomes should be met in full.

Assessment for Outcome 1 could take the form of a set of structured questions requiring extended responses completed under controlled conditions.

Outcome 2 requires the candidate to produce a sales plan using a case study or other stimulus material. The assessment for this Outcome must be a presentation of the sales plan produced. The candidate may support the presentation with appropriate slides or images, etc.

The same case study/stimulus material could be used for both assessments.

SQA Advanced Unit specification: statement of standards

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The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Candidates should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

Outcome 1

Evaluate the role of sales planning as part of the marketing activities of an organisation.

Knowledge and/or Skills

- ◆ Relationship between sales planning and marketing planning.
- ◆ Methods of evaluating sales performance.

Evidence Requirements

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can:

- ◆ Explain the importance of sales planning and its role within marketing planning.
- ◆ Identify and explain the considerations in planning the structure of a sales function.
- ◆ Evaluate an organisation's sales performance using three different criteria.

Assessment Guidelines

Assessment for this Outcome could take the form of a set of structured questions, based on stimulus material, requiring extended responses completed under controlled conditions, which is recommended as partial open-book with learners allowed one page of notes. The candidate's response should cover the relationship between marketing and sales, the role of sales planning in meeting overall marketing objectives and the structure of the sales function and the market in which it operates.

Outcome 2

Produce a sales plan for an organisation.

Knowledge and/or Skills

- ◆ Sales forecasting
- ◆ Sales planning process
- ◆ Sales plan

Evidence Requirements for the Unit

Candidates will need to provide evidence to demonstrate their Knowledge and/or Skills by showing that they can:

- ◆ Use appropriate forecasting methods to produce:
 - an accurate sales forecast for a given time period
 - monthly sales targets.

- ◆ Following the sales planning process, produce an appropriate sales plan which includes:
 - situational analysis
 - sales objectives
 - identification of target market
 - an action plan
 - forecasts/targets
 - monitoring and control.

The assessment for this Outcome is a presentation by the candidate on the sales plan produced.

Assessment Guidelines

This Outcome must be assessed by a presentation by the candidate on the sales plan produced; the candidate may support the presentation with appropriate slides or images etc. Candidates may use a case study or a live organisation of the candidate's choice (where adequate information for forecasting is available to candidates). The presentation may be recorded and a tutor checklist used to ensure all evidence requirements are covered.

SQA Advanced Unit specification: support notes

Unit title: Sales Planning

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 40 hours.

Guidance on the content and context for this Unit

This Unit is a mandatory Unit within the SQA Advanced Diploma in Marketing Group Award. The Unit is designed to provide candidates with knowledge and understanding of the sales planning process, including its role and function within an organisation's marketing activities. It also aims to provide the skills to produce of a sales plan.

Outcome 1 is designed to enable candidates to understand the importance of sales planning and its role within marketing planning; meeting marketing objectives and its contribution to the implementation of marketing strategies.

An appreciation of the considerations of the structure and organisation of the sales function (marketing strategy, sales strategy, distribution channels, territories – geographic or turnover based).

The criteria and techniques used to monitor and evaluate the sales function could include manpower, territory, markets, resources etc.

Outcome 2 has been designed to develop an understanding of the sales planning process and to develop the skills required to produce sales forecasts and a sales plan. The forecasts can be either produced separately or incorporated as part of the overall sales plan. The forecast could include:

- ◆ short, medium and long term forecasting
- ◆ micro and macro forecasting
- ◆ the application of quantitative techniques - this should be supported by appropriate calculations.

Consideration may be given to volumes, values, demand, pricing levels, product mix and marketing strategies when sales forecasting.

In order to cover the evidence requirements, the sales plan should include:

- ◆ situational analysis
- ◆ sales objectives
- ◆ identification of target market
- ◆ an action plan
- ◆ forecasts/targets
- ◆ monitoring and control.

Guidance on the delivery and assessment of this Unit

It is envisaged that an integrated approach to teaching the Unit will be adopted whereby the candidates will appreciate the strong links between each of the Outcomes. The Unit is designed to maximise the potential for candidates to apply knowledge and understanding to a given context.

The latest materials and examples from current sales planning practices should be used to highlight any theory. Candidates should be encouraged to use live organisations for assessment purposes but only where it is possible to obtain access to the organisation's information and figures. This will highlight the different practices and strategies used by different organisations. It is necessary for candidates to gather and apply knowledge rather than regurgitate information.

Outcome 1 may take the form of a set of structured questions requiring extended responses completed under controlled conditions (partial open-book with learners allowed one page of notes).

Outcome 2 must be assessed by a presentation by the candidate on the sales plan that s/he has produced. The candidate may support the presentation with appropriate slides or images, etc. The presentation may be recorded and a tutor checklist would be helpful to ensure that all evidence requirements are covered.

Opportunities for developing Core Skills

There are no Core Skills embedded in this Unit. However, the following table gives some examples of the opportunities for developing Core Skills within this Unit.

Core Skill	SCQF level	Opportunities for development
Communication	Level 6	Both Outcomes can contribute to the reading and writing aspects of this Core Skill.
Written Communication (Reading)	Level 6	Candidates are expected to read and understand complex written information and to collect research data from a range of sources.
Written Communication (Writing)	Level 6	Candidates have to produce well-structured and clear responses addressing the Evidence Requirements. Where written evidence is provided this may be in the form of extended response answers and plans using formal structure and recognised format.

Core Skill	SCQF level	Opportunities for development
Oral Communication	Level 6	As the assessment for Outcome 2 takes the form of a presentation, there is the opportunity to develop oral communication skills. Candidates have to cover a complex topic and integrate the use of formal language — at times using complex and specialist vocabulary. They have to convey information and opinions with supporting detail accurately. The presentation may be supported by relevant images or slides.
Problem Solving	Level 6	There is the opportunity to develop problem solving Skills. All Outcomes can contribute to critical thinking. Candidates will be required to analyse, seek and justify solutions to a range of theoretical and practical problems and issues.
Numeracy	Level 6	Candidates will have the opportunity to develop numeracy skills through the analysis and interpretation of sales and market statistics; the use of statistical and graphical methods for sales forecasting, and preparation of sales budgets.
Information Technology	Level 6	Candidates may have the opportunity to develop the Core Skill of Information Technology through the use of suitable software packages for statistical forecasting and effective presentation of data.

Open learning

If this Unit is delivered by open or distance learning methods, additional resources will be required for candidate support, assessment and quality assurance. Further information and advice can be found on our website (www.sqa.org.uk).

Equality and inclusion

This unit specification has been designed to ensure that there are no unnecessary barriers to learning or assessment. The individual needs of learners should be taken into account when planning learning experiences, selecting assessment methods or considering alternative evidence.

Further advice can be found on our website www.sqa.org.uk/assessmentarrangements.

History of changes to Unit

Version	Description of change	Date

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SQA acknowledges the valuable contribution that Scotland's colleges have made to the development of SQA Advanced Qualifications.

FURTHER INFORMATION: Call SQA's Customer Contact Centre on 44 (0) 141 500 5030 or 0345 279 1000. Alternatively, complete our Centre Feedback Form.

General information for candidates

Unit title: Sales Planning

In this Unit you will be offered the opportunity to develop your understanding of the role of sales planning as part of the marketing activities of an organisation. You will also have the opportunity to develop sales planning skills and an understanding of how to analyse an organisation's sales history and produce a sales forecast and plan.

This Unit gives you a practical insight into how organisations evaluate their sales and how this information is used to plan to meet objectives. On completion of the Unit, you should be able to:

- ◆ Evaluate the role of sales planning as part of the marketing activities of an organisation.
- ◆ Produce a sales plan for an organisation.

This Unit develops your understanding of how to produce a sales plan which has to include:

- ◆ situational analysis
- ◆ sales objectives
- ◆ identification of target market
- ◆ an action plan
- ◆ forecasts/targets
- ◆ monitoring and control

The assessment for this Unit includes a presentation on the sales plan that you have produced. Your tutor will provide you with the exact arrangements for all the assessments for this Unit.

This Unit is a mandatory Unit in the SQA Advanced Diploma in Marketing and this award could assist you to progress to a university degree or to enhance your employment prospects within a sales environment.