

CFAM&LFC1 (SQA Unit Code - H427 04)

Plan and monitor the work of sales teams

Overview

This unit is about planning and monitoring sales structures and/or territories and call plans for a team of sales people. It includes identifying the most appropriate sales structures/ territories, and preparing call plans according to identified customer needs and selling opportunities.

Who is the unit for?

This unit is recommended for those with responsibility for planning and monitoring the selling activities of an organisation's sales personnel, but who may not necessarily be sales specialists. For example, such individuals might be 'general' managers within larger organisations, or managers and/or proprietors within small to medium sized organisations.

Related specialist units

Those seeking specialist standards offering greater depth regarding this area are referred to the following related MSSSB units:

Sales units

2.5 Plan and resource the work of the sales team

2.7 Plan and manage sales territories

2.8 Develop, implement and monitor sales call plans

9.3 Devise sales strategies to suit procurement practices of key customers

Details of these units can be accessed via <www.msssb.org>

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Performance criteria

- You must be able to:*
- P1 Identify factors affecting sales trends, measure the impact on the existing sales structure and resources available and consider the implications for existing and future sales structures
 - P2 Evaluate the criteria which your key customers use to choose suppliers, and the impact of such criteria upon your customers' buying practices
 - P3 Analyse sales resource requirements, based on information about the number, size and location of customers, and identify potential gaps that need to be fulfilled to achieve sales targets
 - P4 Determine the approach appropriate for structuring your sales team activities, including whether these should be focused upon territories, particular customer types and/or industry sectors
 - P5 Assign sales team members according to the approach selected, by matching their knowledge, abilities and skills to the requirements of customers within the relevant territories, customer types and/or sectors
 - P6 Identify customers and prospects to contact by telephone, email, or in person
 - P7 Determine the time available to deal with your prospective or existing customers in order to sell effectively
 - P8 Set financial and sales activity targets for the sales team
 - P9 Review the selling procedures of the sales team to ensure that they can meet sales targets, and legal and regulatory compliance requirements
 - P10 Monitor the effectiveness of sales call plans, identifying promptly any significant variances from agreed targets
 - P11 Make agreed tactical adjustments to call plans, where necessary, to achieve targets

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 Different ways of structuring sales forces, including territory management, customer type and industry sector management, and the reasons for preferring each
- K2 The reasons why an organisation might establish, maintain or change its sales management structure
- K3 How sales structures are established and the factors to be taken into account in establishing an appropriate structure
- K4 The concept of 'preferred supplier' status as used by customers when selecting suppliers of products/services
- K5 The variety of procurement practices used by a range of organisations
- K6 How to prioritise calls according to the potential value and probability of a sale
- K7 How to develop a call plan and record the outcome of each call effectively
- K8 How to evaluate and measure the success of sales calls
- K9 Techniques for motivating a sales force, including the use of tactical sales incentives
- K10 Sources of general and specialist advice on effective resourcing of the sales team

Knowledge and understanding

You need to know and understand:

Industry/sector specific knowledge and understanding

- K11 Legal and regulatory issues impacting upon selling and related procurement practices in your industry/sector

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Knowledge and understanding

Context specific knowledge and understanding

You need to know and understand:

- K12 Your own organisation's sales strategies, plans and targets, including those in relation to relevant key accounts
- K13 Employment contracts with members of the sales team
- K14 Current working practices of the sales team
- K15 Your organisation's products and services
- K16 The geographical spread of your organisation's potential and existing customers
- K17 The criteria used by your key customers to select their suppliers, and how they affect their procurement practice
- K18 Your organisation's actual and potential competitors and partners and the key features of their selling strategies

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Behaviours

When performing to this standard, you are likely to demonstrate the following behaviours:

1. You communicate effectively with all sales team members and show respect at all times
2. You are honest, sincere and ethical in your sales approach

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