

Sales Level 4

QCF Units of Assessment

Final NVQ Units

December 2010

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Title	Prioritising information for sales planning	
Skills CFA Unit No.	SAL4-1	
WBA Unit No.	D/502/8651	
Level	4	
Credit Value	3	
GLH	20	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand sources and types of information that support sales	1.1 Describe the information about customers' behaviour that is relevant to sales 1.2 Explain the nature of competitors' sales activities 1.3 Explain the relevance of information from the external business environment to sales, 1.4 Describe sources of business information relevant to sales	
2. Understand internal information that supports sales	2.1 Describe the customer base of the organisation 2.2 Explain organisational information storage procedures 2.3 Explain organisational procedures for communicating sales-based information to the sales team	
3. Be able to carry out a business audit of the internal and external sales environment	3.1 Obtain information about customers and competitors from a variety of sources to enable a business audit to be conducted 3.2 Organise sales information to support effective sales planning 3.3 Prioritise the internal strengths and weaknesses, and external opportunities and threats the organisation faces in relation to sales objectives	
4. Be able to use sales information to support the sales planning function	4.1 Monitor trends and developments that impact on business and sales activities against agreed criteria 4.2 Identify market developments and their implications for organisational sales plans 4.3 Ensure that sales information is communicated to those who need it in accordance with organisational procedures	

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge, understanding and skills to ensure an organisation has a clear and up-to-date picture of its markets and can use appropriate information to support the development of sales strategies and plans.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Monitoring and managing sales team performance	
Skills CFA Unit No.	SAL4-2	
WBA Unit No.	M/502/8654	
Level	4	
Credit value	5	
GLH	32	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand methods of monitoring sales team performance	1.1 Explain the importance of monitoring sales team performance 1.2 Explain the importance of giving feedback on performance 1.3 Describe the role of key performance indicators in monitoring sales team performance 1.4 Explain the importance of encouraging sales team members to ask questions, make suggestions and seek clarification 1.5 Explain the use of sales-related information in managing the performance of sales team members in formal performance appraisals 1.6 Explain the use of tools in monitoring performance of the team	
2 Be able to manage performance of the sales team	2.1 Determine key performance indicators for monitoring the performance of individual sales staff that are appropriate for their targets and objectives 2.2 Plan the work of the sales team, identifying priorities, resources and/or critical activities 2.3 Provide practical help to sales staff in support of achieving their sales objectives 2.4 Monitor the quantity and quality of sales team members' work against agreed key performance indicators 2.5 Provide feedback to sales staff on their sales performance 2.6 Give public recognition to successful performance 2.7 Agree ways of improving performance in cases of unacceptable performance	

Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide knowledge and skills for monitoring and managing the performance of a sales team.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Developing sales proposals	
Level	4	
Skills CFA Unit No.	SAL4-3	
WBA Unit No.	A/502/8656	
Credit value	5	
GLH	30	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand how to write sales proposals	1.1 Explain how to write a proposal that differentiates the offer from that of a competitor and promotes organisational strengths 1.2 Describe how to put together a persuasive argument based on quantitative and qualitative evidence 1.3 Explain the importance of addressing the brief in tender documentation 1.4 Explain the importance of using the “house style” in proposals 1.5 Explain the legal and ethical issues relating to sales proposals 1.6 Explain the client’s procedures for submitting sales proposals	
2 Be able to develop sales proposals	2.1 Ensure the prospect’s or customer’s requirements are addressed in the proposal 2.2 Ensure that all identified issues requiring clarification are resolved before the proposal is finalised 2.3 Identify the conditions and constraints which need to be included within the proposal in order to protect the organisation’s interests 2.4 Present the proposal in “house style” 2.5 Ensure that the proposal is based on market factors 2.6 Provide the required level of detail as briefed by the prospect or customer 2.7 Ensure that the price reflects the value within the proposal 2.8 Gain internal approval before submission 2.9 Supply the proposal within the agreed timescale	
3 Be able to evaluate the proposal	3.1 Obtain feedback from colleagues and the customer on the proposal 3.2 Evaluate the outcome of the proposal and recommend improvements for the future	

Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills for preparing sales proposals for customers.
Unit expiry date	31 December 2013

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Building and retaining sales relationships	
Skills CFA Unit No.	SAL4-4	
WBA Unit No.	F/502/8657	
Level	4	
Credit value	5	
GLH	34	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand the benefits and risks of planning and investing in sales relationships	1.1 Explain the criteria by which to evaluate and prioritise customers with whom the organisation should build sales relationships 1.2 Explain the long term value that customers can bring to the organisation through developing sales relationships with them 1.3 Describe how to identify risks involved in relationships with customers 1.4 Explain how to build trust, commitment and co-operation with customers 1.5 Explain methods of monitoring and evaluating customer relationships	
2 Be able to build sales relationships	2.1 Prioritise customers with whom to build sales relationships 2.2 Balance existing and potential customer needs and expectations with those of the organisation's sales strategy 2.3 Develop a customer relationship plan which takes into account the organisation's resource requirements 2.4 Offer products and/or services in terms of customer needs and expectations 2.5 Negotiate sales solution(s) with the customer that are mutually beneficial 2.6 Identify further opportunities to develop the relationship with the customer	
3 Be able to retain sales customers	3.1 Collate customer feedback about the organisation's provision of products and/or services in accordance with organisational procedures 3.2 Ensure that the quality and consistency of products and/or services is being maintained 3.3 Manage customer complaints or problems and provide sales solutions in accordance with organisational procedures and standards 3.4 Ensure feedback is given to colleagues on the status of the sales relationship 3.5 Monitor and evaluate the sales relationship in accordance with organisational procedures	

Additional information about the unit	
Unit purpose and aim(s)	The unit is designed to enable build strong relationships with customers and understand customer's needs and expectations more clearly by working in partnership with them.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Developing and implementing sales support and customer service programmes	
Skills CFA Unit No.	SAL4-5	
WBA Unit No.	L/502/8659	
Level	4	
Credit value	5	
GLH	35	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand the requirement to provide sales support and customer service programmes	1.1 Explain the advantages and disadvantages of customer care programmes, customer support and customer service programmes 1.2 Explain how customer care programmes, customer support and customer service programmes add value for customers and the organisation 1.3 Describe how service standards are developed and used to manage performance in customer service 1.4 Explain quality assurance models that help to manage customer service quality 1.5 Explain how to ensure that the level of service provided continues to meet customer expectations	
2 Be able to develop sales support and/or customer service programmes	2.1 Plan a sales support and customer service programme in accordance with the sales strategy 2.2 Evaluate the effectiveness of existing processes for managing and providing service to customers against agreed criteria 2.3 Develop a sales support or customer service programme, or recommend improvements to existing processes that meet the agreed criteria 2.4 Establish resource requirements directly related to the sales area to deliver sales support and customer management to the agreed standard	
3 Be able to implement sales support and customer service programmes	3.1 Identify appropriate ICT support for effective communication with customers 3.2 Adapt to changing circumstances in implementing sales support and customer service programmes in accordance with the plan 3.3 Record customer management information in accordance with organisational procedures 3.4 Keep those concerned with sales support and customer service up to date with customer management information 3.5 Ensure ongoing compliance with quality initiatives, processes and procedures and service level agreements as agreed between the customer and the organisation	

	3.6 Take prompt action in the event of shortfalls in service standards in accordance with the sales strategy
Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills on how to ensure that high levels of sales and customer service support are delivered.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Recruiting sales team members	
Skills CFA Unit No.	SAL4-6	
WBA Unit No.	L/502/8662	
Level	4	
Credit value	4	
GLH	23	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand the recruitment and selection process relating to sales	1.1 Explain the advantages and disadvantages of different methods of recruitment and selection of sales staff 1.2 Describe the information that should be included in a job advertisement 1.3 Identify the legislation that relates to recruitment and selection 1.4 Explain the advantages and disadvantages of different types of specialist expertise available to select sales staff 1.5 Describe the criteria by which sales applications are sifted 1.6 Explain what, how, and why feedback should be made available to all candidates	
2 Be able to prepare to recruit and select sales team members	2.1 Agree the recruitment and selection methods with sales and human resources colleagues 2.2 Develop the technical sales component of job profiles 2.3 Develop the technical sales component of person specifications 2.4 Keep within the agreed budget in the recruitment and selection process 2.5 Record the reasons for pre-interview selection decisions in accordance with organisational procedures 2.6 Devise a list of interview questions that address the key competences for a sales team member as defined in the person specification	
3 Be able to make selection decisions for sales team members	3.1 Contribute to interviews in accordance with agreed role 3.2 Use the agreed rating criteria to select staff 3.3 Record the reasons for selection decisions in accordance with organisational procedures 3.4 Complete post-interview formalities in accordance with organisational procedures	

Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills involved in recruiting and selecting members of the sales team.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Specifying database requirements and data audits to inform sales activities	
Skills CFA Unit No.	SAL4-7	
WBA Unit No.	Y/502/8664	
Level	4	
Credit Value	5	
GLH	28	
Learning Outcomes	Assessment Criteria	
The learner will	The learner can	
1. Understand the design requirements of databases in supporting sales activities	1.1 Explain the factors to be considered when designing a database 1.2 Describe the purpose and stages of a data audit 1.3 Describe the information required by sales teams from a database 1.4 Explain organisational processes for sales database management and maintenance 1.5 Describe the importance of adapting organisational sales databases to enable sales objectives to be met	
2. Be able to carry out a data audit in order to inform sales-related decisions	2.1 Define the data needs of the sales function 2.2 Compare findings of the audit with existing processes and databases 2.3 Identify areas for improvements in sales database design and use, from an analysis of the audit 2.4 Use information from the data audit to justify sales-related decisions	
3. Be able to evaluate database solutions to support the sales function	3.1 Evaluate the option of outsourcing specialist assistance in database solutions against agreed criteria and the implications of doing so 3.2 Specify the functionality and data fields of sales databases to enable sales objectives to be met 3.3 Evaluate software and hardware requirements for the development and implementation of the database against agreed criteria 3.4 Suggest modifications to existing databases to meet changing information needs of the sales team 3.5 Develop guidance materials that explains the use of the database	

Additional Information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills necessary to facilitate the design, modification and use of databases to store, analyse and provide information for sales activities.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if	Sales NOS (Skills CFA)

appropriate)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Account planning and management	
Skills CFA Unit No.	SAL4-8	
WBA Unit No.	H/502/8666	
Level	4	
Credit value	6	
GLH	44	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1. Understand sales forecasting techniques	1.1 Describe how historical sales data informs sales forecasts 1.2 Explain the advantages and disadvantages of a range of sales forecasting techniques 1.3 Describe how sales forecasts are used to set sales objectives and targets	
2. Be able to set sales objectives and targets in customer account plans	2.1 Set sales objectives and targets for customer account plans within agreed timescales 2.2 Identify the implications for setting sales objectives and targets 2.3 Set sales objectives and targets for customer account plans that are Specific, Measurable, Achievable, Realistic and Time-bound (SMART) 2.4 Calculate the volume of sales activities and resources needed to achieve objectives and targets	
3. Be able to manage the implementation of customer account plans	3.1 Schedule sales activities for the customer account plan 3.2 Manage physical resources in accordance with the customer account plan 3.3 Define individual roles and targets in implementing the customer account plan and communicate these to stakeholders 3.4 Gain commitment to the implementation of the customer account plan 3.5 Identify variances between customer account plans and performance 3.6 Implement contingency plans to address variances in accordance with organisational procedures 3.7 Monitor and control the plan in consultation with the customer	
Additional information about the unit		
Unit purpose and aim(s)	This unit aims to provide the skills needed to set sales objectives and targets and manage the implementation of a customer account plan.	
Unit expiry date	31 December 2013	
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA	

Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Operational planning and management for sales managers	
Skills CFA Unit No.	SAL4-9	
WBA Unit No.	K/502/8667	
Level	4	
Credit value	6	
GLH	44	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1. Understand sales forecasting techniques	1.1	Describe how historical sales data informs sales forecasts
	1.2	Describe how sales forecasts are used to set sales objectives and targets
	1.3	Explain a range of sales forecasting techniques
2. Be able to set objectives and targets in the sales plan	2.1	Identify the implications for setting sales objectives and targets for sales activities
	2.2	Set sales objectives and targets for sales plans within agreed timescales that are Specific, Measurable, Achievable, Realistic and Time-bound (SMART)
	2.3	Calculate the volume of sales activities needed to achieve objectives and targets
3. Be able to write an operational sales plan	3.1	Specify the actions to be undertaken to achieve sales objectives and the resources required
	3.2	Specify and allocate sales territories in a way that optimises individuals' strengths and expertise
	3.3	Obtain the resources needed to achieve the operational sales plan's objectives and targets
	3.4	Schedule sales activities to meet sales objectives
4. Be able to manage the implementation of the operational sales plan	4.1	Manage physical resources in accordance with the operational sales plan
	4.2	Define individual roles and targets in the sales plan
	4.3	Identify variances between sales plans and performance
	4.4	Monitor and control the operational sales plan using agreed key performance indicators
	4.5	Implement contingency plans to address variances in accordance with organisational procedures
5. Understand how to deal with variances in performance from the operational sales plan	5.1	Describe variances that may occur in the implementation of the operational sales plan
	5.2	Explain the basis of contingency plans to address variances
	5.3	Describe organisational procedures for dealing with unforeseen variances

Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills necessary for putting together an operational sales plan and implementing the plan.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Preparing and managing sales budgets	
Skills CFA Unit No.	SAL4-10	
WBA Unit No.	D/502/8665	
Level	4	
Credit value	5	
GLH	42	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand how to set a sales budget	1.1 Explain different methods for setting budgets including competitive parity, the objective and task approach, negotiated budgeting, incremental or historical budgeting and judgement methods 1.2 Explain how to establish information needs and sources of information used for setting a sales budget 1.3 Describe the advantages and disadvantages of different approaches to effective consultation and negotiation when setting a sales budget 1.4 Explain how to develop budget frameworks that are clearly understood and measurable 1.5 Explain how to ensure that budgets are fit for purpose	
2 Be able to set a budget for sales activities	2.1 Use feedback from colleagues to set sales budget 2.2 Confirm the budget as fit for purpose for identified sales activities 2.3 Obtain approval from internal stakeholders to the proposed sales budget	
3 Understand how to manage variances to sales budgets	3.1 Explain the reasons for variances to the budget 3.2 Explain the different types of action that can be taken to address variances 3.3 Describe how to provide measurable information on budget performance and appropriate timescales for this 3.4 Explain how to identify lessons learned from budget preparation and implementation, to underpin future budget-setting 3.5 Describe organisational procedures to report identified or suspect fraudulent activities to relevant departments	
4 Be able to manage a sales budget	4.1 Identify the causes of variances between the sales budget and actual expenditure 4.2 Address the causes of variances between budget and actual expenditure in accordance with organisational procedures 4.3 Negotiate revisions to the sales budget in response to variances	

	<p>4.4 Provide information on performance against the sales budget to others in the organisation</p> <p>4.5 Monitor the administration of the sales budget to identify potentially fraudulent activities</p>
5 Be able to evaluate the effectiveness of the sales budgeting process	<p>5.1 Evaluate the budget process against agreed criteria</p> <p>5.2 Make recommendations for improvements to future sales budgeting</p>
Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the skills and knowledge to set and manage a sales budget for a defined area of sales activity or the whole sales function.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Finance for operational sales managers
Skills CFA Unit No.	SAL4-11
WBA Unit No.	R/502/8663
Level	4
Credit value	4
GLH	30
Learning Outcomes	Assessment Criteria
The learner will:	The learner can:
1 Understand how financial considerations impact on the profitability of sales	1.1 Explain the use of profitability ratios in informing sales decisions 1.2 Explain the inter-relationships between pricing and profitability 1.3 Explain the importance of establishing the creditworthiness of customers 1.4 Explain the importance of assessing factors influencing price sensitivities 1.5 Explain how to evaluate the effectiveness of the organisational pricing strategy 1.6 Explain the scope for adapting the organisational pricing strategy to maximise profitability
2 Be able to calculate profitability ratios for sales-related decisions	2.1 Calculate gross profit margin in accordance with the agreed method 2.2 Calculate net profit ratio in accordance with the agreed method 2.3 Explain the difference between margin and mark-up 2.4 Calculate return on capital employed in accordance with the agreed method
3 Be able to assess creditworthiness of customers to set a credit limit	3.1 Establish customers' requirements for sales and credit 3.2 Explain to customers the organisational process for approving credit applications 3.3 Obtain sufficient financial information from customers to enable credit searches to be conducted 3.4 Carry out a range of internal checks within the organisation including analysis and assessment of accounts reports from colleagues 3.5 Carry out external checks through banks, credit rating agencies or supplier references 3.6 Formalise the terms of trade with the customer in accordance with organisational procedures
Additional information about the unit	
Unit purpose and aim(s)	This unit aims to introduce the knowledge and skills needed to calculate profitability and also; assess customer creditworthiness and to formalise the terms of trade with the customer.
Unit expiry date	31 December 2013

Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Managing legal, regulatory, ethical and social requirements in sales	
Skills CFA Unit No.	SAL4-12	
WBA Unit No.	F/502/8660	
Level	4	
Credit value	4	
GLH	25	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1. Understand the legal, regulatory, ethical and social requirements pertaining to the sales function	1.1. Explain sales-related legal and regulatory requirements and Codes of Practice 1.2. Explain how sales-related processes and policies in the organisation meet ethical and social requirements and comply with legal and regulatory requirements	
2. Be able to manage the sales function in a way that complies with legislation	2.1 Ensure that sales employees understand organisational policies and procedures 2.2 Ensure that sales employees understand the importance of putting organisational policies and procedures into practice 2.3 Analyse the potential impact of emerging social and ethical concerns relating to the sales function 2.4 Monitor the way that sales-related policies and procedures are put into practice 2.5 Identify shortfalls in the development and/or implementation of sales-related policies and practices 2.6 Address identified shortfalls and provide support to the sales team in the implementation of sales-related policies and practices 2.7 Share best practice with sales team members	
3. Understand how to deal with non-compliance	3.1 Explain how to identify failures to meet the legal and regulatory requirements 3.2 Explain the basis for measures to correct failures to meet the legal and regulatory requirements 3.3 Explain how and when to report about failures to meet requirements to stakeholders	
Additional information about the unit		
Unit purpose and aim(s)	<p>This unit aims to cover the knowledge and skills involved in managing an organisation's operations in ways that are consistent with its and ethical principles, and which fulfil legal and regulatory requirements.</p> <p>For the purposes of this unit, 'organisation' can mean a self-contained entity such as a private sector company, a charity or a local authority, or a significant operating unit, with a relative degree of autonomy, within a larger</p>	

	organisation.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Managing sales negotiations	
Skills CFA Unit No.	SAL4-13	
WBA Unit No.	T/502/8655	
Level	4	
Credit value	5	
GLH	33	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand what is involved in a sales negotiation	1.1 Explain how to assess the resource requirements for sales negotiation 1.2 Describe how to assess the customer's negotiating power and stance 1.3 Explain the types of sales objections that might arise 1.4 Explain the concept of 'win-win' situations 1.5 Identify the key variables and trade-offs that may be made to achieve a 'win-win' situation 1.6 Explain the importance of recording details of a sales negotiation in accordance with organisational procedures	
2 Be able to prepare for sales negotiations	2.1 Confirm the customer's requirements for the negotiations 2.2 Assess the bargaining power of the customer and determine their negotiating stance 2.3 Identify organisational weaknesses that could be exploited by the customer in a negotiation 2.4 Prepare strategies for responding to likely objections and organisational weaknesses 2.5 Define realistic objectives for the negotiations 2.6 Brief those involved in the negotiation on the negotiation plan and roles within it 2.7 Identify parameters for variables including potential concessions and trade-offs 2.8 Identify the best price that could be offered and the minimum price and terms that can be agreed	
3 Be able to carry out negotiations with customers	3.1 Balance the needs of the organisation with those of the customer 3.2 Agree on the terms and conditions for the supply of the product or service 3.3 Record the outcomes of negotiations in accordance with organisational procedures 3.4 Evaluate the outcomes of the negotiation against the negotiation objectives 3.5 Obtain feedback from colleagues and/or customers on areas for improvement	
Additional information about the unit		

Unit purpose and aim(s)	This unit aims to provide the knowledge and skills for negotiating in sales settings.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Developing and implementing sales promotions	
Skills CFA Unit No.	SAL4-14	
WBA Unit No.	K/502/8653	
Level	4	
Credit value	3	
GLH	24	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1 Understand the implications for sales of a range of sales promotions	1.1 Explain the role of sales promotions in helping to achieve sales targets 1.2 Explain the advantages and disadvantages of a range of sales promotions 1.3 Explain how sales promotions are monitored and measured 1.4 Explain the internal and external influences on the success of a sales promotion	
2 Be able to develop a sales promotion	2.1 Identify and prioritise sales promotions objectives which are consistent with the organisation's sales strategy 2.2 Select customer groups to be targeted by the sales promotion 2.3 Specify the sales promotion incentive and response mechanisms 2.4 Identify opportunities for up-selling and cross-selling 2.5 Test proposed sales promotion tools to ensure that they offer the right incentive to buy in accordance with their role in the sales promotion plan 2.6 Determine the resources required to implement the agreed sales promotion 2.7 Obtain approval of the sales promotion within the sales promotion programme 2.8 Forecast the impact on the sales effort of achieving the stated promotion objectives 2.9 Set sales performance indicators and success criteria for the sales promotion	
3 Be able to implement a sales promotion	3.1 Implement the roll-out of the sales promotion in accordance with the plan 3.2 Make adjustments to the sales promotion within the limits of own authority 3.3 Obtain feedback from colleagues and customers on areas for improvement 3.4 Evaluate the outcomes of the sales promotion campaign against agreed sales performance indicators	

Additional information about the unit	
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills involved in designing, developing and implementing sales promotions.
Unit expiry date	31 December 2013
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)	
Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
Name of the organisation submitting the unit	Skills CFA
Availability for use	Shared
Unit available from	1 December 2010

Title	Portfolio management for operational sales managers	
Skills CFA Unit No.	SAL4-15	
WBA Unit No.	Y/502/8650	
Level	4	
Credit value	4	
GLH	25	
Learning Outcomes		Assessment Criteria
The learner will:		The learner can:
1. Understand the need for portfolio analysis and management and the sales information needed to support this process	1.1 Explain the role of portfolio management within the sales function 1.2 Describe the strengths and weaknesses of tools used to analyse the product and/or service portfolio 1.3 Describe the sales information needed to manage portfolios	
2. Be able to analyse the product and/or service portfolio	2.1 Identify the characteristics, profile, strengths and weaknesses of the products and/or services within the portfolio 2.2 Calculate the sales volume and sales value of products and/or services within the portfolio 2.3 Identify the relationships between products and/or services that influence buying decisions and their impact on portfolio management 2.4 Provide information for portfolio management to internal stakeholders about: <ul style="list-style-type: none"> - sales volumes - sales value - market trends - customer opinion 2.5 Recommend retention or divestment of products and services based on the analysis of the portfolio	
Additional information about the unit		
Unit purpose and aim(s)	This unit aims to provide the knowledge and skills to enable the sales manager to provide information for determining selling priorities across a portfolio of products and services based on an analysis of the current and potential profitability of the components of the portfolio and to make recommendations for retention or divestment of products and/or services.	
Unit expiry date	31 December 2013	
Details of the relationship between the unit and relevant national occupational standards or other professional standards or curricula (if appropriate)	Sales NOS (Skills CFA)	
Assessment requirements or guidance specified by a sector or regulatory body (if appropriate)		

Support for the unit from an SSC or other appropriate body (if required)	Skills CFA
Location of the unit within the subject/sector classification system	15. Business, Administration and Law 15.4 Marketing and Sales
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