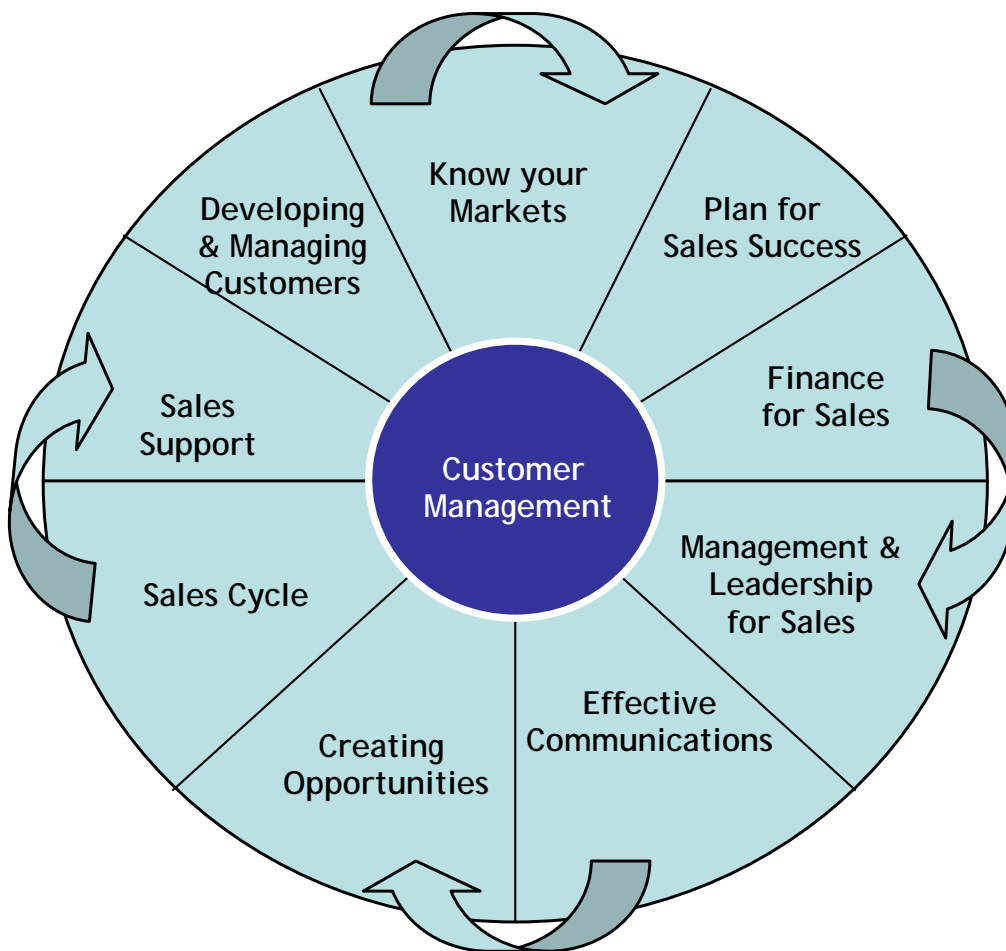


Sales National Occupational Standards Functional Map

Sales Key Purpose

To create, build and sustain mutually beneficial and profitable relationships through personal and organisational contact.



SALES FUNCTIONS AND UNIT OVERVIEWS

1 KNOW YOUR MARKETS

1.1 Obtain and analyse sales-related information

This unit is all about obtaining and analysing information that helps you to understand the markets you sell into and the volume, mix and value of the products or services you sell.

The unit stresses why it is important to use market information and the role that you play in finding information from different sources, analysing it and considering the implications for the organisation.

1.2 Analyse competitor information

This unit is all about how you obtain and analyse information to understand the impact of competitors on your own organisation's sales activities.

You need to be aware of different methods of collecting competitor information, different sources of competitor information and how to use the information effectively to strengthen your own organisation's sales proposition.

1.3 Use databases to support sales activities

This unit is all about how you use databases to store, analyse and provide information that is useful to the sales process.

The unit covers the full process of designing, setting up, populating, modifying and using databases.

However, this work cannot be done in isolation and you need to consult others about their information needs and sources, and how the information will be used by the sales function.

1.4 Use information to make sales-related decisions

This unit is all about using information to make recommendations directly relating to the sales function. Decisions are needed that affect your customers, markets, products and services.

The unit covers how to interpret data that has been collected and analysed to support decision-making. It also covers how to ensure that any recommendations and decisions that are made are clearly justifiable, take account of available resources, stay within budget and are realistic in terms of time available.

2 PLANNING FOR SALES SUCCESS

2.1 Prioritise information for sales planning

This unit is about ensuring that your 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.

The focus of the unit is on ensuring that you collect sales information about the operating environment including customer needs, market trends, new technologies, legislation and regulation, competitor activity and pricing conditions.

The unit also covers your organisation's internal operating environment and the resources available for sales activities.

2.2 Develop responsible sales strategies and plans

The focus of this unit is on developing sales strategies and plans that contribute to the successful implementation of marketing strategies. The sales strategy must take full account of the organisation's values and ethical principles together with legal and ethical requirements

When developing sales strategy you need to take responsibility for identifying issues which may have an impact upon the strategy, set clear objectives and prepare staff for any changes. The strategy will need to display responsibility towards staff, customers, investors, local communities and other stakeholders. You also need to define criteria for deciding on the success of the strategy.

The sales strategy must protect the organisation's reputation both through effective sales performance and by taking account of the views of people in the community on a whole range of issues such as the environment and other ways in which the organisation affects people's quality of life.

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 organisation.

2.3 Contribute to the development of business plans

This unit is about helping your organisation develop a clear sense of direction and long-term business plans that take full account of the sales dimension.

Sales managers need to focus on the future and assist in the development of a clear vision of where the organisation is going. They also need to develop a clear vision of the part sales will play in getting there.

2.4 Sales activity planning

The focus of this unit is on the development of sales activity plans that are effective in delivering sales success.

The unit is designed to make sure that Sales Managers are able to develop a plan in order to achieve sales targets, consider the frequency and level of sales activity required, and build in allowances for potential problems.

2.5 Plan and resource the work of the sales team

This unit is all about planning and resourcing the sales team. Sales Managers and Senior Sales Managers must be able to use sales-related information. They must then decide on the most appropriate use of resources and the most efficient work methods to achieve sales targets.

The unit covers a wide range of resource options to meet organisational and personal needs. These options include establishing criteria for effective sales team members, deciding where they will work and quantifying the human, financial and capital resources they need to achieve their personal sales targets together with sales team targets.

2.6 Lead and manage sales projects

This unit is about managing a project for which you have been given responsibility. This involves developing and agreeing a plan for the project and monitoring and controlling implementation of and changes to the plan. It also involves ensuring that the project achieves its key objectives and is completed to the satisfaction of the project sponsor(s) and any key stakeholders.

2.7 Plan and manage sales territories

This unit covers the design of sales territories and the planning of the work of the sales team in those territories.

You will analyse the market, and appraise options for the definition of territories in order to establish the appropriate territory plan to optimise the sales effort.

You will also be expected to plan and resource the work of the sales team in those territories.

2.8 Develop, implement and monitor sales call plans

This unit is all about developing an effective sales call plan. An effective plan is one that enables sales team members to meet their personal sales targets. It also leads to the achievement of organisational turnover, profit and growth targets.

The unit is designed to ensure that you prepare call plans covering each individual customer. The plan ensures that customer needs are identified and opportunities for selling, up-selling, and cross-selling are fully exploited.

You will need to show professionalism and sensitivity towards your customers and your desire to meet customer needs at all times.

2.9 - Contribute to the development of new products and services

As a Sales Team Leader and member of the sales team you may become involved in the development of a new product or service. This unit is all about the contribution you can make. The unit focuses on consultation processes, being a member of a product or service development team, liaising with the research and development team, testing new product or service concepts and taking part in the screening and trialling of new ideas and concepts.

The unit includes assisting in the development of a business case and feasibility study, using your knowledge of your market to underpin the analysis.

3 FINANCE FOR SALES

3.1 Forecasting sales and setting sales targets

This unit is about forecasting sales and setting sales targets for your own area of responsibility, either on an individual or team basis.

The unit includes how to collect and use information to develop a sales forecast, based on past and present sales data, factors which influence sales, sales trends, market conditions and product and service developments within your organisation.

You then use forecasts based upon value and volume measures to develop sales targets

3.2 Set, manage and administer sales budgets

This unit is about having ownership of and being responsible for a sales budget for a defined area of sales activity or the whole sales function. It involves preparing, submitting and agreeing a budget for a set operating period. It also involves monitoring actual performance against agreed budget and taking necessary action in response to identified variances and any unforeseen developments.

3.3 Assess customer creditworthiness

You generally need to assess a customer's creditworthiness before allowing them to open an account and use credit limits offered by your organisation. Creditworthiness is also assessed when a customer starts dealing with you in a new or different area of business.

You should be able to follow your organisation's own process of carrying out credit checks, credit assessments, seeking references from other accounts and undertaking a range of financial searches. These activities may involve working in co-operation with the accounting function.

You should also be able to use financial tools to analyse and assess your customer's financial status and to decide whether or not to do business with them in the future.

3.4 Pricing to promote products and services

This unit is about designing and implementing price promotions, incentives or discounts in line with organisational pricing policies. Price promotions or incentives can be aimed at extending distribution and motivating the buyer. As a sales person you are expected to monitor and evaluate the effectiveness of price promotions to customers for developing long-term value in the business.

3.5 Evaluate the ongoing financial potential of key customer accounts

This unit focuses on the need to manage the financial performance of key customer accounts. It can cost five times as much to win a new customer as it does to retain an existing customer. However, organisations often fail to realise the costs of maintaining customers. This unit is about how to maximise profit by monitoring and taking action on unprofitable accounts.

You need to understand that measurement of potential and financial performance of key customer accounts must be undertaken at the opening of the account and throughout the relationship with your customer.

If you measure and understand the profitability of key accounts you can direct and define the development of your customer relationships and their overall impact on your business.

4 LEADING AND MANAGING SALES

4.1 Lead a sales team

This unit is about how you provide direction to the members of the sales team by motivating and supporting them to achieve their team and individual objectives.

You need to be aware of the culture and diversity of the team and to be sensitive to the individual and corporate needs of the team whilst focusing on the achievement of team sales targets.

4.2 Provide learning opportunities for colleagues

This unit is about supporting colleagues in identifying their learning needs and helping to provide opportunities to address these needs. Encouraging colleagues to take responsibility for their own learning is an aspect of this unit as is your role in providing an 'environment', for example, in your team or area of responsibility, in which learning is valued. For the purposes of this unit, 'colleagues' means those people for whom you have line management responsibility.

4.3 Motivate sales professionals and sales partners

This unit is about how team leaders and managers can achieve results through effective motivation of sales team members and sales partners

The unit focuses on the principles of motivating sales staff to produce excellent results by

- reducing negative feelings
- encouraging positive feelings
- creating enthusiasm and involvement
- concentrating efforts on key issues

The unit includes both formal and informal incentives for boosting sales team motivation.

4.4 Recruit sales team members

This unit is about recruiting, selecting and providing a satisfactory induction for members of the sales team.

You need to be objective when involved in recruiting and selecting sales team members and to ensure that the process is fair, considers diversity, is appropriate to organisational needs and has maximum transparency throughout.

It will be important to draw on internal and external expertise in when recruiting sales team members.

4.5 Work with other business functions (Joint unit with Marketing)

This unit is about working effectively with other business functions within the organisation towards realising your marketing goals and objectives, and promoting marketing as central to overall business strategy. It includes managing the interface with other functions, establishing shared business goals and the capabilities, roles, responsibilities, rights and expectations of each function. It also includes monitoring performance against mutual expectations and evaluating the effectiveness of the working relationships in achieving share goals.

4.6 Plan change

This unit is about the planning that is needed to make a specific change or put into practice a programme of change. It involves developing a strategy to make the change that is needed, taking note of barriers, risks and the need to put appropriate monitoring and communication systems in place.

4.7 - Implement change

This unit is about putting into practice the strategy and associated plans for a specific change or programme of change. This involves putting in place the necessary resources and supporting systems, including monitoring and communications, to turn the 'vision' into a practical reality.

4.8 Monitor and evaluate sales team performance

This unit is about how to develop and operate systems for monitoring and evaluating the performance of a sales team and its members. It covers the steps needed to work with colleagues to ensure that there is evidence of sales team performance that contributes appropriately to organisational objectives.

4.9 Manage your own personal and professional development in sales

This unit is about managing your personal and professional development in order to achieve both personal and team objectives.

It will therefore be important to understand your own role, your contribution to the team and how it fits into the achievement of organisational strategies. In doing so, it is vital to reflect on organisation and personal values, career and wider personal aspirations.

It is important to identify your and your manager's requirements for knowledge, skills and abilities in current and future roles.

4.10 Ensure health and safety requirements are met in your area of responsibility

This unit is concerned with managing the overall health and safety process in your area of responsibility. It is intended to go beyond meeting health and safety legislation and move towards a situation where health and safety considerations are firmly embedded in the planning and decision making processes and the 'culture' of your area of responsibility. The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

5 EFFECTIVE COMMUNICATIONS

5.1 Develop sales proposals and quotations

This unit focuses on preparing proposals and sales quotations for customers.

The preparation of proposals involves identifying your customer's requirements and matching them with the objectives and requirements of your organisation. Proposals need to include sufficient detail of the products or services to be provided and timescales. A proposal or quotation is expected to conform to your organisation's house-style. The proposals need to be competitive and to have any necessary conditions and constraints built into them to protect the interests of your organisation.

5.2 Prepare and facilitate sales meetings

This unit is about organising and running sales meetings. Meetings are a central component of the sales process. They sometimes involve only members of the sales team and sometimes involve you and your customers.

In either situation you must plan the meeting and decide what you want to achieve in it. You must then take part in the meeting in a way that enables you to achieve your objectives. You need to facilitate the meeting in a way that keeps it running smoothly and discourages unhelpful diversions and disagreements.

5.3 Develop and deliver a professional sales presentation

This unit focuses on developing and delivering effective sales presentations to maximise sales potential. Both formal and informal presentations are required for existing and potential customers.

The unit is about how to develop and deliver a presentation, including considering your customer's needs and preparing a presentation to meet those needs.

You should be prepared to give a dynamic and effective sales presentation to suit your target audience. The presentation should be pre-planned and provide opportunities for questions to be asked.

You should be prepared to take advantage of all opportunities to practice delivering a presentation and evaluate your personal performance in order to improve future presentations.

5.4 Manage and prioritise time for sales activities

This unit is about managing and prioritising time in your sales role. The heart of effective time management is being able to plan and manage time on a daily and weekly basis to achieve sales targets.

You will be expected to demonstrate sound time management principles when undertaking a range of activities including analysing time, planning use of time in the light of your objectives, prioritising activities, delegating activities, and reflecting continuously on overall performance.

5.5 Develop your personal networks

This unit is about developing your personal networks to support both your current and future work. Your personal networks may include people in your own organisation, people you meet from other organisations and people you are in contact with over the phone or the internet. Developing personal networks is based on the principles of reciprocity (exchanging things with others for mutual benefit) and confidentiality. People only want to network if there are mutual benefits from exchanging information and other resources. There must also be clearly agreed boundaries of confidentiality – certain information and resources may not be exchanged because they are confidential.

6 CREATING SALES OPPORTUNITIES

6.1 Develop and implement sales promotions

This unit is about designing, developing and implementing sales promotions at a strategic level. It recognises that sales promotions make a key contribution to sales performance and provide the sales team with a valuable additional tool to extend their sales efforts.

The unit covers the establishment of sales promotion objectives for the organisation's products or services and identifying the most beneficial sales promotion techniques to attract customers.

6.2 Use direct marketing to support sales activities

This unit is about using direct marketing to support face-to-face and telesales activities. It includes the use of direct mail to warm up customers in order to increase new sales and aid retention of existing customers through follow-up of direct marketing activities.

The unit also includes consideration of ways in which to measure the success of direct marketing activities

6.3 Sell products and services at trade fairs, exhibitions or conferences

Trade fairs and exhibitions are a major investment of time, money and effort and it is imperative that sales people take every opportunity that arises.

This unit is designed to focus on the range of activities associated with preparing for and taking part in a trade fair or exhibition and the organisation that is needed to make the most of the sales opportunities they present.

6.4 Undertake sales demonstrations

This unit is designed to enable sales team members to prepare for and provide creative, professional and inspiring demonstrations of their organisation's products or services to customers.

You need to have sufficient understanding of and competence in relation to the products or services and be able to demonstrate it, promote all the features and benefits, answer customer questions and deal with sales objections.

This unit demands that you should identify customer needs and interests for products and services and ensure that the demonstration meets customer needs effectively

You need to provide a professional demonstration of products or services and to take opportunities to progress the sale as a result.

7 THE SELLING CYCLE

7.1 Generate and follow up sales leads

This unit is an integral part of the sales cycle. It involves making initial contact with sales leads through a variety of different methods and establishing their needs. You need to advise potential customers of any products that may interest them and take the opportunity to promote further related products to them.

You need to obtain and record information about the contact you have with customers. This will include their buying needs and any further action required. You should also collect relevant information about other suppliers. Most of all you should discover whether a customer's interests suggest that there may be an opportunity for up selling or cross selling.

7.2 Sell products and services face-to-face

This unit is about selling to customers face to face. Some contact with your customers may be via telephone, e-mail or in writing but successful performance in this unit involves direct contact with customers.

The unit aims to encourage sales performance in a number of areas but in particular after initial contact has been made with customers. The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

7.3 Sell products and services over the telephone

This unit is about identifying, developing and closing sales over the telephone from both inbound and outbound calls.

The unit includes identifying your customer's buying needs, promoting benefits and features of your organisation's products and services, responding to and resolving customer objections and agreeing mutually beneficial terms and conditions.

The unit also requires you to pick up and respond to verbal and non-verbal buying signals, both negative and positive, as well as demonstrating good levels of knowledge and understanding of your organisation's products and services.

7.4 Sell products or services in international markets

This unit covers sales of products or services to international customers and how to manage some of the complexities of trading in international markets.

The unit recognises the need to do a great deal of preparation prior to visiting foreign countries for sales purposes and the need to ensure that there is a clear understanding of issues relating to culture, language, security and acceptable approaches to selling in of different countries. It also covers the need to ensure that you do not inadvertently miss an opportunity because of misreading situations and signals.

7.5 Manage and facilitate case negotiations

This unit is about negotiating effectively in sales settings. The unit focuses on the various stages of negotiation including planning, preparing, negotiating and closing sales proposals with customers.

The unit covers establishing customer requirements and your organisational objectives, clarifying the customer's understanding of the proposal and coming to an agreement that is mutual acceptable.

7.6 Handle objections and close sales

This unit focuses on handling and overcoming sales objections in order to be able to close the sale effectively.

It covers how you must focus on preventing and overcoming objections and closing a sale in a way that is mutually beneficial to both your customer and your organisation.

You will need to evaluate a range of different sales situations and demonstrate a good knowledge and understanding of your products or services in a way that enables you to convince your customer and close the sale.

7.7 Ensure compliance with legal, regulatory, ethical and social requirements

This unit is about managing an organisation's operations in ways that are consistent with its values and ethical principles, and which fulfil legal and regulatory requirements.

Organisations must show that they act responsibly in relation to their staff, customers, investors and the communities in which they work. All types of organisations must obey the law in key areas such as health and safety, employment, finance and company law. Many organisations also have to work within specific regulations for their industry and ethical frameworks. Organisations who want to maintain a good reputation also have to take account of the views of people in their communities on a whole range of issues such as the environment and other ways in which the organisation affects people's quality of life.

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 organisation.

7.8 Demonstrate compliance with legal, regulatory and ethical requirements for sales activities

This unit is about representing the organisation that you work for in ways that are consistent with its values and ethical principles, and which fulfil legal and regulatory requirements.

Organisations must show that they act responsibly in relation to their customers, investors, the communities in which they work and their staff. Organisations must obey the law in key areas such as health and safety, employment, finance and company law. Most importantly for salespeople, organisations must obey contract law and avoid illegal activity such as misrepresentation. They are also responsible for the security of customer data. Most organisations have to work within specific regulations and ethical frameworks for their sector.

For the purposes of this unit, 'organisation' can mean a self-contained entity such as a private sector Company, a charity, a local authority or a significant operating unit with a relative degree of autonomy within a larger organisation.

8 SALES PROCESSING AND SUPPORT

8.1 Input and access data in your organisation's information systems

This unit is about sales data. You must be able to use both manual and computerised information systems to store and access information and to supply it to others.

The unit is designed to ensure that you appreciate the importance of storing information in the right place as well as being able to deal with matters such as managing out of date information, handling confidential information and working within legal and regulatory limits.

8.2 Assist customers to obtain finance for purchases

This unit is about assisting customers to obtain finance to buy products or services.

The unit involves calculating the potential borrowing needs of your customer and identifying a variety of finance options which may be appropriate to their needs.

You must carry out all necessary credit checks and discuss them with your customer in advance. You will then inform your customer of the decision and implement the drawdown of financial facilities.

This unit must be undertaken in strict adherence with legal and regulatory requirements for financial services and data protection.

8.3 Process customer orders and payments

This unit covers obtaining information from customers about their requirements, identifying the source and availability of the products or services, assessing the credit status of customers and dealing with the processing of their order.

Within this you will need to give accurate information to your customer and make arrangements to supply products or services.

One focus of the unit is on collecting appropriate information, completing order forms, raising invoices and notifying the customer whether or not processing can be fulfilled in the normal timescales.

8.4 Monitor the delivery of products

This unit is about preparing for despatch of goods to customers. Key aspects of this unit include ensuring all the necessary documentation is completed as well as making sure that, before hand-over, the goods are in the condition agreed with your customer at the time of the sale.

The unit also includes ensuring that the goods are confirmed as satisfactory by your customers taking the opportunity to exploit further opportunities of cross-selling, up-selling or selling add-ons at the time of hand-over.

8.5 Meet your customer's after sales service needs

This unit focuses on how after-sales service is provided in a way that meets your customer's needs.

You will need to focus on ensuring customer service standards are maintained and dealing with problems and complaints professionally.

The unit covers how you should constantly seek feedback from customers on service reliability and regularly report on the outcomes

9 DEVELOPING AND MANAGING CUSTOMERS

9.1 Establish and understand potential market segments (Joint unit with Marketing)

This unit is about researching the behaviours and motivations of customers towards understanding potential market segments at which organisations' products/services might be targeted. It includes analysing the data to confirm that clusters suggested by the analysis are real and can be used to inform a market segmentation strategy.

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 organisation.

9.2 Build and retain effective sales relationships

The purpose of this unit is to provide a basis for building effective sales relationships and also maintaining them.

The unit is designed to enable you to build a strong relationship with your customer and understand your customer's needs and expectations more clearly by working in partnership with them.

This unit is also about maintaining sales relationships through building relationships based upon trust, commitment and co-operation designed to achieve long-term customer loyalty.

9.3 Devise sales strategies to suit procurement practices of key customers

This unit focuses on how customer organisations select suppliers as part of their supply chain.

If you are involved in winning key customer business you must know how organisations select their suppliers and be able to maximise opportunities for becoming key members of the supplier chain by achieving preferred supplier status.

You need to recognise the process that procurement organisations go through in order to select their suppliers and ensure that they influence your design of products or services and your procedures for their delivery.

9.4 Build and deliver customer service and customer care support

The unit is about building and delivering customer service and customer care support for key customers served by your organisation.

When taking on new key customers and continuously managing the account structure, it is imperative that there is an internal sales infrastructure to deal with customer requirements on a day to day basis. It is important from a sales perspective to ensure that there is available resource to provide customer service, customer care and sales support.

The aim of this unit is to encourage you to become a customer service champion in your organisation, providing good sales support through a detailed knowledge and awareness of the key components of delivering effective customer service.

9.5 Contribute to the development of sales support and customer management programmes

This unit focuses on how sales teams work together at all levels and with customers to ensure that they deliver high levels of sales and customer services support through good administrative and quality processes.

The delivery of excellent customer service involves working with others, communicating with others and consulting others in order to meet the challenge of managing key customers effectively.

The unit covers how you contribute to the development and implementation of customer management programmes. It is also about you being a proactive sales team member contributing to the successful delivery of sales support and customer management programmes.

9.6 Monitor and control relationship management activities

This unit is about the role of the sales team in monitoring and controlling customer relationships in order to maintain and continuously control the level of service offered. The unit also covers the initiation of change to products or services in response to the changing needs and expectations of key customers.

The focus of the unit is on identifying current methods of obtaining feedback and information to support monitor activities and ensuring feedback on customer service is actively sought and acted on.