

Overview

This standard is about planning and monitoring the work of sales teams. You create sales and call plans for a team of sales staff. You select sales team structures and activities based on identified customer needs and selling opportunities, setting financial and sales activity targets. You also review selling procedures and monitor sales call effectiveness, adjusting plans when required.

This standard is for all managers and leaders.

Performance criteria

You must be able to:

1. identify factors affecting sales trends for your organisation
2. measure the impact of trends on the existing sales structure and resources available
3. analyse the implications of trends for existing and future sales structures
4. evaluate the criteria your key customers use to choose suppliers, and how these impact your customers' buying practices
5. analyse sales resource requirements, based on information about the number, size and location of customers
6. identify potential gaps that need to be fulfilled to achieve sales targets
7. select an approach for structuring your sales team activities including territories, customer types and industry sectors
8. assign sales team members using the approach selected, matching their knowledge, abilities and skills to the requirements of customers within the relevant territories, customer types or sectors
9. identify customers and prospects to contact by telephone, email, or in person
10. estimate the time required to deal with your prospective or existing customers to sell effectively
11. set financial and sales activity targets for the sales team
12. review the selling procedures of the sales team to ensure that they can meet sales targets
13. monitor the effectiveness of sales call plans, identifying any significant variances from agreed targets
14. encourage members of sales teams to discuss new ideas for improvement and offer criticisms
15. make agreed tactical adjustments to call plans, where necessary, to achieve targets
16. follow the legal, organisational, codes of practice and policies relevant to planning and monitoring the work of sales teams

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

1. the different ways of structuring sales forces, including territory management, customer type and industry sector management, and the reasons for selecting each
2. the reasons why an organisation might establish, maintain or change its sales management structure
3. how sales structures are established and the factors to be considered when establishing an appropriate structure
4. the concept of 'preferred supplier' status as used by customers when selecting suppliers of products and services
5. the variety of procurement practices used by a range of organisations
6. how to prioritise calls according to the potential value and probability of a sale
7. how to develop a call plan, record the outcome of each call effectively and measure the success of sales calls
8. the techniques for motivating a sales force, including the use of tactical sales incentives
9. the exchange of ideas and criticism for performance improvement
10. the sources of general and specialist advice on effective resourcing of the sales team

Industry and sector specific knowledge and understanding

11. the legal, organisational, codes of practice and policies relevant to planning and monitoring the work of sales teams

Context specific knowledge and understanding

12. your own organisation's products and services, sales strategies, plans and targets, including those in relation to relevant key accounts

13. the employment contracts and current working practices of the sales team

14. the geographical spread of your organisation's potential and existing customers

15. the criteria used by your key customers to select their suppliers, and how they affect their procurement practice

16. your organisation's actual and potential competitors and partners and the key features of their selling strategies

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Skills

1. Analysing
2. Communicating
3. Decision-making
4. Evaluating
5. Information management
6. Involving employees
7. Monitoring
8. Obtaining feedback
9. Planning
10. Presenting information
11. Problem solving
12. Setting objectives
13. Thinking strategically
14. Thinking with a focus on customers

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