

CFAS2.2

Develop responsible sales strategies and plans



Overview

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.

This unit is for Senior Managers and Key Customer Managers.

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Performance criteria

You must be able to:

- P1 analyse the role that the sales team must make to the implementation of the marketing strategy
- P2 carry out customer segmentation analysis to identify key customer groups and segments to target in order to maximise sales success whilst taking full account of legal, regulatory, ethical and social responsibilities
- P3 review business strategies and compliance requirements and define the link between business and marketing strategies in order to determine sales
- P4 set sales objectives which contribute to organisational strategies and take full account of legal, regulatory, ethical and social responsibilities
- P5 review the structure of the sales team to evaluate its ability to achieve sales
- P6 investigate customer purchasing preferences in order to determine appropriate distribution strategies
- P7 investigate sales procedures for cost effectiveness and legal, regulatory, ethical and social responsibility compliance and recommend improvements where appropriate
- P8 determine human, physical and financial resource requirements of the sales process and recommend changes where appropriate
- P9 develop and detail the sales activity plan cross referencing it to legal, regulatory, ethical and social responsibilities
- P10 monitor and evaluate the success of the sales strategy using measures including KPIs and sales targets
- P11 make recommendations for change to the sales strategy supported by a fully detailed business case
- P12 communicate all changes in strategy to key stakeholders
- P13 encourage a climate of openness about meeting and not meeting legal, regulatory, ethical and social requirements
- P14 identify and correct any failures to meet the legal, regulatory, ethical and social requirements
- P15 identify reasons for not meeting requirements and adjust the policies and procedures to reduce the likelihood of failures in the future
- P16 the different types of sales organisational structures, such as geographic, product based, customer-based or brand-based
- P17 the options for distribution channels including traditional and modern technological options
- P18 the features of procurement that affect decision-making about distribution channels
- P19 how to deploy sales resources effectively, including people, finance and physical resources
- P20 different monitoring tools for evaluating sales success

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- P21 methods for consulting and communicating with the sales team about strategy development
- P22 the importance of having an ethical and value-based approach to governance and how to put this into practice
- P23 relevant legal requirements governing the running of organisations
- P24 current and emerging social attitudes to management practice and the importance of being sensitive to these

You must be able to:

Industry/sector specific knowledge and understanding

- P25 legal and regulatory sales requirements for your sector
- P26 market developments in your sector
- P27 competitive practices within your sector
- P28 procedures to follow if the organisation does not meet legal and regulatory
- P29 particular current and emerging social concerns and expectations that are relevant to the sector
- P30 ways in which other organisations deal with current and emerging social concerns and expectations

You must be able to:

Context specific knowledge and understanding

- P31 the structure and key features of the markets in which your organisation operates
- P32 what competitors and strategic partner organisations do and are planning in the market-place, and the implications of this for your organisation
- P33 marketing and customer information sufficient to carry out segmentation analysis
- P34 how to identify new sales opportunities
- P35 your organisation's business and marketing strategy, objectives and plans
- P36 your organisation's plans for delivering the sales strategy effectively
- P37 the extent of resources available to deliver sales strategy effectively
- P38 procurement practices of customers and how they impact on proposed sales practices
- P39 the accepted channels of distribution for your organisation and their effectiveness
- P40 the importance of management information systems in your organisation for the achievement of sales plans
- P41 your organisation's approach to internal consultation on strategy
- P42 the culture and values of the organisation and what effect they have on corporate governance
- P43 policies and procedures that make sure people meet the requirements
- P44 the processes for maintaining the relevant policies and procedures and making sure they continue to be effective
- P45 the different ways in which people may not meet the requirements and the risks of these actually happening

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P46 the procedures for dealing with people who do not meet the requirements, including requirements for reporting

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Knowledge and understanding

You need to know and understand:

- K1 how the marketing and sales functions relate to each other and how their activities contribute to business strategy
- K2 the process involved in undertaking a segmentation analysis that includes demographic, geographical, lifestyle and behavioural segmentation
- K3 the sales and marketing tools required to undertake a gap analysis using PESTEL and SWOT techniques
- K4 the SMART approach to setting sales objectives and sales statistics that can be used in SMART (Specific, Measurable, Achievable, Realistic, Time bound) objectives
- K5 the different types of sales organisational structures, such as geographic, product based, customer-based or brand-based
- K6 the options for distribution channels including traditional and modern technological options
- K7 the features of procurement that affect decision-making about distribution channels
- K8 how to deploy sales resources effectively, including people, finance and physical resources
- K9 different monitoring tools for evaluating sales success
- K10 methods for consulting and communicating with the sales team about strategy development
- K11 the importance of having an ethical and value-based approach to governance and how to put this into practice
- K12 relevant legal requirements governing the running of organisations
- K13 current and emerging social attitudes to management practice and the importance of being sensitive to these

Industry/sector specific knowledge and understanding

- K14 legal and regulatory sales requirements for your sector
- K15 market developments in your sector
- K16 competitive practices within your sector
- K17 procedures to follow if the organisation does not meet legal and regulatory
- K18 particular current and emerging social concerns and expectations that are relevant to the sector
- K19 ways in which other organisations deal with current and emerging social concerns and expectations

Context specific knowledge and understanding

- K20 the structure and key features of the markets in which your organisation operates

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- K33 the processes for maintaining the relevant policies and procedures and making sure they continue to be effective
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- K35 the procedures for dealing with people who do not meet the requirements, including requirements for reporting

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Additional Information

Behaviours

1. you carry out investigation and analysis to develop sales activities
2. you set the sales direction within the limits of your authority
3. you make and justify recommendations on sales strategy taking full account of broader organisational implications
4. you assess financial implications of sales activities in the context of strategy
5. you deploy resources effectively
6. you create a sense of common purpose and direction
7. you involve others in decision making
8. you review, measure and monitor progress of sales strategy implementation
9. you identify and raise ethical concerns
10. you are vigilant for potential risks relating to legal, regulatory, ethical or social responsibilities
11. you show sensitivity to stakeholders' needs and manage these effectively

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1132 Marketing and sales managers
3542 Sales representatives
7113 Telephone salespersons
7129 Sales related occupations nec

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