

CFAS2.3

Contribute to the development of business plans



Overview

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.

Sales Managers, Key Customer Managers, Senior Sales Managers and other sales personnel who contribute to the development of business plans.

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Performance criteria

You must be able to:

- P1 work towards establishing a clear, achievable and compelling vision for the organisation that takes full account of the sales dimension
- P2 assist in preparing a plan that identifies and prioritises business and sales objectives that are consistent with the vision of the organisation
- P3 check that your vision balances business risk with business and sales objectives
- P4 check that the vision balances innovation with tried and tested solutions
- P5 ensure that the plan is flexible and open to change
- P6 develop policies and promote values that will guide others towards your vision
- P7 decide who should be responsible for achieving business and sales goals and then allocate resources effectively
- P8 identify measures for monitoring and evaluating performance against the business and sales plan working together with senior colleagues
- P9 gain the commitment of the sales team to the business and sales plan
- P10 bring together the needs and expectations of the sales team with what is required of them to achieve the objectives of the business and sales plan

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Knowledge and understanding

You need to know and understand:

- K1 the importance of long and medium-term business and sales planning
- K2 the principles of strategic management and business planning
- K3 what a written business and sales plan should cover
- K4 the importance of creativity and innovation in strategic management
- K5 how to identify potential risks in relation to the achievement of objectives
- K6 how to develop strategic objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time bound)
- K7 how to delegate responsibility and allocate resources to support a business plan
- K8 the importance of consulting colleagues and other stakeholders during the development of the business and sales plan and how to do so effectively
- K9 how to develop measures and methods for monitoring and evaluating performance against the strategic business and sales plan

Industry/sector specific knowledge and understanding

- K10 legal, regulatory and ethical requirements in your sector
- K11 market developments in your sector

Context specific knowledge and understanding

- K12 the market in which your organisation works
- K13 your organisation's actual and potential customer base
- K14 the needs and expectations of your actual and potential customers
- K15 your actual and potential competitors and partners, and their strategic plans
- K16 new and available market opportunities
- K17 your organisation's ability to respond to market opportunities
- K18 the needs and expectations of colleagues and other key stakeholders
- K19 processes for consultation within your organisation
- K20 sources of information that can aid monitoring and evaluation

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Additional Information

Behaviours

1. you constantly seek to improve business and sales performance
2. you generate and recognise imaginative and innovative solutions
3. you reflect regularly on your own and others experiences and use these to inform future actions
4. you work with senior colleagues to balance business risk with business and sales benefits
5. you work to build consensus about the way forward
6. you consider the impact of your own actions on others
7. you link business and sales plans effectively with the achievement of long term aims
8. you create a sense of common purpose with the sales team and other members of the organisation
9. you find practical ways of overcoming barriers to achieving business and sales success
10. you show sensitivity to the sales team's needs and interests in the context of the plan

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3542 Sales representatives
7113 Telephone salespersons
7129 Sales related occupations nec

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