

CFAS2.4 Sales activity planning



Overview

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.

This unit is for Sales Managers

CFAS2.4

Sales activity planning

Performance criteria

You must be able to:

- P1 use information about customers, competitors and markets to make informed decisions about the development of your sales activity plan
- P2 consult colleagues about ideas and approaches to the development of your sales activity plan
- P3 identify sales targets in your business plan relevant to sales activity planning
- P4 identify and evaluate the range, nature and frequency of sales activities needed to achieve sales targets
- P5 draw up your sales activity plan with due regard to legal, regulatory and ethical considerations
- P6 identify the key resource requirements for implementing your sales activity plan
- P7 establish key monitoring, control and key performance indicators for measuring the success of your plan
- P8 anticipate and identify potential problems that might arise to challenge the achievement of your plan and find solutions to them
- P9 consult colleagues about your sales activity plan and adjust it accordingly
- P10 communicate the revised plan to all stakeholders and define individual roles and targets in the sales activity plan
- P11 gain commitment to the implementation and achievement of your plan and targets
- P12 monitor and evaluate your plan for sales success and identify appropriate actions to bring your plan back on track where necessary

CFAS2.4

Sales activity planning

Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 How your sales activity plans are based on information from the marketing and sales strategy
- K2 The importance of developing short, medium and long term plans
- K3 The principles of sales activity planning
- K4 The importance of encouraging creativity and innovation in sales activity planning
- K5 The importance of communicating and consulting with colleagues about the development of sales activity plans
- K6 How to delegate and allocate resources effectively to implementation of the sales activity plan
- K7 How to monitor and evaluate sales activity plans
- K8 The potential barriers to sales activity planning and how to overcome them effectively
- K9 The areas for potential conflict within the planning and implementation of the sales activity plan and how to prepare contingency plans to overcome these difficulties.

Industry/sector specific knowledge

- K10 Legal, ethical and regulatory requirements of your industry/sector
- K11 Marketing and sales developments in your industry/sector
- K12 Competitor sales activities in your industry/sector

Context specific knowledge

- K13 Your organisation's vision, strategy and objectives
- K14 Your organisation's marketing and sales strategies
- K15 The resource requirements to meet your sales activity plans
- K16 Possible distribution channels to reach markets

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- K17 How to carry out a customer segmentation analysis
- K18 How internal customer relationships affect the successful implementation of your sales activity plan
- K19 Different models and templates for sales activities plans
- K20 Organisational practices for monitoring and controlling sales activities
- K21 What resources are available to implement sales activity plans

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CFAS2.4

Sales activity planning

Additional Information

Behaviours

1. you prioritise and use information effectively in order to identify the way forward for the sales plan
2. you recognise and acknowledge the contribution of others in establishing the sales activity plan
3. you consider the impact of your own actions and that of others on the successful implementation of the sales activity plan
4. you create a sense of direction and common purpose in the achievement of sales targets and objectives
5. you are responsive and show sensitivity to others when consulting about the sales activity plan
6. you balance benefits against risks that may arise from the implementation of your plan
7. you take opportunities when they arise to achieve sales targets and
8. you find ways of overcoming barriers to the development and implementation of your plan
9. you reflect regularly on your own and others' experience and relate it directly to the implementation of your plan
10. you review, reflect on and revise activities within your plan, based upon measurement of achievement of targets
11. you demonstrate full awareness and active consideration of the legal, regulatory and ethical considerations of devising a sales activity plan

CFAS2.4

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

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