

CFAS2.5

Plan and resource the work of the sales team



Overview

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.

This unit is suitable for face-to-face selling, telesales and online selling

The unit is suitable for Sales Managers, Key Customer Managers and Senior Sales Managers.

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Performance criteria

You must be able to:

1. use sales planning and forecasting information to assess the scope of resource requirements for the sales team
2. identify new factors affecting sales trends, measure the impact on the existing resources available to the team and consider the implications for existing and future team members
3. analyse sales team resource requirements and identify potential gaps in resources that need to be filled to achieve sales targets
4. review potential changes in sales team structure and consider the impact on the team's resource needs
5. identify the sales skills and profile of sales team members needed to meet the organisation's sales targets
6. determine what resources are available to support the development of the sales force
7. look for ways of using sales team resources and decide whether they can be re-deployed in a more efficient and effective way
8. develop plans to meet the resource and development needs of the sales functions in the short, medium and long term
9. review the procedures of the sales team to ensure that they can meet sales targets and legal and regulatory compliance requirements
10. consult key stakeholders about work methods and sales team activities to assess the level of support the sales force will require
11. continuously monitor and evaluate sales team performance and resource

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Knowledge and understanding

You need to know and understand:

- K1 the range of resources used within the sales organisation, including human, financial and capital based resources
- K2 the sources of information needed to carry out resource planning and how to obtain that information
- K3 how to take into account issues relating to health and safety, equality and diversity when planning for sales team structures, procedures and activities
- K4 the different ways in which human and capital resources can be deployed in the sales team
- K5 different working methods used by sales teams
- K6 sources of general and specialist advice on effective resourcing of the sales team
- K7 different working practices including central base and remote working
- K8 typical barriers to effective use of resources and how they might be overcome
- K9 financial management and budgeting techniques used to assess the financial implications of resourcing the sales team effectively
- K10 quality assurance processes for the management and use of resources
- K11 technology used by the sales team how it can be used for remote working

Industry/sector specific knowledge and understanding

- K12 current legislative and regulatory requirements and codes of practice relating to employment
- K13 trends and developments in the sector which might impact upon future sales team planning
- K14 the working culture and practices of sales people within the industry/sector

Context specific knowledge and understanding

- K15 your own organisation's sales strategies, plans and targets
- K16 employment contracts with members of the sales team
- K17 current working practices of the sales team
- K18 the diversity policies of your organisation
- K19 the recruitment policies of your organisation
- K20 financial management and budget techniques used by your organisation
- K21 your organisation's policies on the purchase, deployment and use of capital resources
- K22 your organisation's labour market conditions
- K23 the technologies your organisation makes available to the sales team

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Additional Information

Behaviours

1. you accurately identify and assess the strategic sales direction of your organisation
2. you comply at all times with legal, regulatory and ethical considerations when resourcing the sales team
3. you encourage involvement and consultation in the resource planning

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3542 Sales representatives
7113 Telephone salespersons
7129 Sales related occupations nec

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