

## CFAS2.6

### Lead and Manage sales' projects



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#### Overview

This unit is about managing a sales' project for which you have been given responsibility. This involves developing and agreeing a plan for the project and monitoring and controlling implementation of and changes to the plan. It also involves ensuring that the project achieves its key objectives and is completed to the satisfaction of the project sponsor(s) and any key stakeholders.

The unit is recommended for Sales Managers and Sales Team Leaders.

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#### Performance criteria

*You must be able to:*

- P1 discuss and agree the key objectives and scope of the proposed project and the available resources with the project sponsor(s) and any key stakeholders
- P2 identify how the proposed project fits with the overall vision, objectives and plans of the organisation and any programmes of work or other projects being undertaken
- P3 develop, in consultation with relevant people, a realistic and thorough plan for undertaking the project and achieving the key objectives
- P4 discuss and agree the project plan with the project sponsor(s) and any key stakeholders, making changes where necessary
- P5 brief any project team members on the project plan and their roles and responsibilities and provide ongoing support, encouragement and information
- P6 put processes and resources in place to manage potential risks arising from the project and deal with contingencies
- P7 implement the project plan, selecting and applying a range of basic project management tools and techniques to monitor, control and review progress
- P8 communicate progress to the project sponsor(s), any key stakeholders and any project team members on a regular basis
- P9 identify, in the light of progress and any problems encountered and wider developments, any required changes to the project plan, obtaining agreement from project sponsors and any key stakeholders where necessary
- P10 achieve project objectives using the agreed level of resources
- P11 confirm satisfactory completion of the project with the project sponsor(s) and any key stakeholders
- P12 evaluate the success of the project, identifying what lessons can be learned and recognising the contributions of any project team members

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#### Knowledge and understanding

*You need to know and understand:*

- K1 the fundamental characteristics of projects as opposed to routine management functions/activities
- K2 the role and key responsibilities of a project manager
- K3 key stages in the project lifecycle
- K4 the importance of the relationship between the project manager and the project sponsor(s) and any key stakeholders
- K5 why it is important to discuss and agree the key objectives and scope of a proposed project with the project sponsor(s) and any key stakeholders before detailed planning commences
- K6 the type of information needed for effective project planning
- K7 why it is important to be able to identify and understand how a project fits with the overall vision, objectives and plans of the organisation and any programmes of work or other projects being undertaken
- K8 why it is important to consult with relevant people in developing a project plan and how to do effectively
- K9 what should be included in a project plan, particularly activities, required resources and timescales and why the plan needs to be discussed and agreed with the project sponsor(s) and any key stakeholders
- K10 why it is important that any project team members are briefed on the project plan, their roles and responsibilities and how to do so effectively
- K11 ways of providing ongoing support, encouragement and information to any project team members
- K12 ways of identifying and managing potential risks in relation to the project.
- K13 the importance of contingency planning and how to do so effectively
- K14 how to select from and apply a range of basic project management tools and techniques to monitor, control and review progress of the project
- K15 effective ways of communicating with project sponsor(s) and any key stakeholders during a project
- K16 the importance of agreeing changes to the project plan with the project sponsor(s) and any key stakeholders
- K17 the type of changes that might need to be made to a project plan during implementation
- K18 why it is important to confirm satisfactory completion of the project with the project sponsor(s) and any key stakeholders and how to do so effectively
- K19 how to establish effective systems for evaluating the success of projects and identifying lessons for the future
- K20 the importance of recognising the contributions of project team members to the success of projects and different ways of doing so

#### **Industry/sector specific knowledge and understanding**

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- K21 project management tools and techniques commonly used in the industry or sector
- K22 risks and contingencies common to the industry/sector
- K23 industry/sector specific legislation, regulations, guidelines and codes of practice

#### **Context specific knowledge and understanding**

- K24 the project sponsor(s) – the individual or group for whom the project is being undertaken
- K25 key stakeholders – the individuals or groups who have a vested interest in the success of the project and the organisation
- K26 the agreed key objectives and scope of the proposed project and the available resources
- K27 the overall vision, objectives and plans of the organisation and any other relevant programmes of work or other projects being undertaken
- K28 mechanisms for consulting on the development of the project plan and the views/thoughts received from relevant people in relation to proposals
- K29 the agreed project plan
- K30 the roles and responsibilities of any project team members.
- K31 methods used for briefing, supporting, encouraging and providing information to any project team members
- K32 processes and resources put in place to manage potential risks and deal with contingencies
- K33 type and nature of potential risks identified and contingencies encountered
- K34 specific project management tools and techniques used to monitor, control and review progress
- K35 processes in place for communicating information on progress of the project to the project sponsor(s), any key stakeholders and any project team members
- K36 processes in place for identifying and agreeing changes to the project plan and any changes which have made
- K37 processes for confirming satisfactory completion of the project with the project sponsor(s) and any key stakeholders
- K38 processes for evaluating the success of the project and any lessons which have been learned from undertaking the project
- K39 methods used for recognising the contributions of any project team members to successful projects

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#### Additional Information

##### Behaviours

1. you recognise changes in circumstances promptly and adjust plans and activities accordingly
2. you find practical ways to overcome barriers
3. you present information clearly, concisely, accurately and in ways that promote
4. you create a sense of common purpose
5. you make best use of available resources and proactively seek new sources of support when necessary
6. you act within the limits of your own authority
7. you are vigilant for potential risks and hazards
8. you take pride in delivering high quality work
9. you take personal responsibility for making things happen

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**Developed by** CFA Business Skills @ Work

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**Version number** 1

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**Date approved** April 2010

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**Indicative review date** April 2012

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**Validity** Current

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**Status** Original

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**Originating organisation** Chartered Institute of Marketing

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**Original URN** S2.6

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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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**Suite** Sales 2010

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**Key words** Sales, sales functions, sales strategy, selling

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