

## CFAS4.8

### Monitor and evaluate sales team performance



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#### Overview

This unit is about how to develop and operate systems for monitoring and evaluating the performance of a sales team and its members. It covers the steps needed to work with colleagues to ensure that there is evidence of sales team performance that contributes appropriately to organisational objectives.

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

This unit is for; Sales managers and sales team leaders

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#### Performance criteria

*You must be able to:*

- P1 confirm the work required in your area of responsibility with your manager and seek clarification, where necessary, on outstanding issues
- P2 plan how work will be undertaken, seeking views from appropriate stakeholders, identifying any priorities, resources and/or critical activities
- P3 encourage sales team members to ask questions, make suggestions and seek clarification in relation to allocated work
- P4 determine appropriate key performance indicators/sales targets for monitoring and controlling the performance and quality of work
- P5 monitor the progress and quality of the work of sales team members on a regular and fair basis against key performance indicators
- P6 support sales team members in identifying and dealing with problems and unforeseen events
- P7 motivate sales team members to complete the work they have been allocated and provide the necessary resources and support
- P8 identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with individuals and/or teams
- P9 recognise successful completion of significant sales activities or sales targets by individuals and/or teams
- P10 use information about the performance of sales team members in any formal appraisals of performance
- P11 review and update sales activity plans of work for your area, clearly communicating any changes to those affected

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#### Knowledge and understanding

*You need to know and understand:*

- K1 the need to manage sales team performance effectively
- K2 appropriate key performance indicators and sales targets for sales personnel
- K3 how to select the most appropriate methods of consultation about performance management
- K4 how to brief sales team members on performance issues
- K5 tools for effectively monitoring the quality of the work of sales team members
- K6 ways of effectively recording team performance and using this information fairly in individual and sales team appraisals
- K7 sales team performance management techniques
- K8 what are the potential problems and unforeseen events that may affect sales team performance and appropriate contingency strategies to deal with them
- K9 how to allocate resources appropriately to ensure targets are achievable and realistic
- K10 the best methods for providing constructive feedback and commitment to improvement in individual and team performance
- K11 how to use performance indicators for future planning and team development
- K12 how to effectively manage performance on an ongoing basis
- K13 how to re-allocate resources based upon performance management outcomes and clearly communicate changes to those directly affected by it

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

- K14 industry/sector requirements for the development or maintenance of knowledge, understanding and skills directly relating to sales activities
- K15 industry/sector specific legislation, regulations and codes of practice

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

- K16 the business and sales vision of your organization
- K17 the types of work undertaken in your area of responsibility
- K18 sales targets determined by your organization on an organisational, team and individual level
- K19 available resources for implementation of sales activities
- K20 the overarching plans for sales activities and how your team contributes to the achievement of those plans
- K21 the specific information requirements and needs of your sales team
- K22 your own organization's policy and procedures relating to team development and performance management

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- K23 key performance indicators used by your organisation and their application to measuring the performance of the sales team
- K24 your organisation's policy for dealing with poor performance, including disciplinary and grievance procedures
- K25 the basis of your organization's appraisal systems
- K26 the impact of team performance on externally accredited standards such as Investors in People

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#### Additional Information

##### Behaviours

1. you recognise changes in circumstances promptly and adjust plans and activities accordingly
2. you take personal responsibility for making things happen
3. you show an awareness of your own values, motivations and emotions
4. you show integrity, fairness and consistency in decision-making
5. you agree what is expected of others and hold them to account
6. you aim to understand people's needs and motivations
7. you are vigilant about possible risks and hazards facing the team
8. you encourage and support others to make the best use of their abilities
9. you use a range of leadership styles appropriate to different people and situations

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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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