

CFAS5.4

Manage and prioritise time for sales activities



Overview

This unit is about managing and prioritising time in your sales role. The heart of effective time management is being able to plan and manage time on a daily and weekly basis to achieve sales targets.

You will be expected to demonstrate sound time management principles when undertaking a range of activities including analysing time, planning use of time in the light of your objectives, prioritising activities, delegating activities, and reflecting continuously on overall performance.

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

This unit is for; Sales Executives

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Performance criteria

You must be able to:

- P1 Identify your personal and career targets
- P2 Analyse how time is spent and what opportunities exist for continuous improvement by keeping a detailed log of all work activities
- P3 Consult your line manager or colleagues about your use of time and reflect on feedback
- P4 Identify which periods of time are most productive and aim to make the most of them
- P5 Identify key work-related priorities and evaluate the use of your time in dealing with priority actions
- P6 Identify where there are any anomalies in your use of time or where you waste time
- P7 Evaluate all tasks you undertake and eliminate unnecessary tasks that are not directly related to your objectives
- P8 Delegate or share tasks which are time consuming but not a major contributor to your personal achievement
- P9 Consolidate tasks to reduce workload and time wastage
- P10 Develop a motivational time management plan or weekly schedule, prioritising all tasks in order of relative importance and urgency
- P11 Reflect on major obligations and targets directly relating to your role
- P12 Review long-term commitments and immediate goals to ensure you are on track to achieve personal goals and sales targets

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Knowledge and understanding

You need to know and understand:

- K1 the importance of time management and the impact it can have on sales success
- K2 why effective long term performance in the sales function relies on successful establishment of a work/life balance
- K3 how a sales team member uses and measures the use of time
- K4 how to carry out a regular time-use analysis and use it to increase your efficiency
- K5 best practice time management techniques
- K6 why prioritising tasks by balancing urgency and importance is important
- K7 the concept of delegation and how to delegate effectively
- K8 how to prepare daily and weekly time plans
- K9 how to vary work to keep it interesting
- K10 how to avoid time wasting activities
- K11 the importance of saying no in certain situations
- K12 how to make time management motivational
- K13 how to review and reflect on time use and its contribution to your sales objectives

Industry/Sector specific knowledge and understanding

- K14 relevant sector legislation relating to Health and Safety, working hours and employment responsibilities and rights

Context specific knowledge and understanding

- K15 organisational sales strategies and plans
- K16 your organisation's approach to time management
- K17 organisational and personal sales forecasts and targets
- K18 organisational weekly and daily call targets
- K19 the geographical distribution and concentration of your customers
- K20 the scope of your area of responsibility
- K21 non-selling activities that need to be undertaken in your area of responsibility and how to manage the time these activities take
- K22 how travel plans may affect your effective use of sales time
- K23 who you can delegate work to

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Additional Information

Behaviours

1. you take an analytical approach to evaluating time management
2. you develop an understanding of the most effective use of work time
3. you realize that some tasks take longer than others
4. you use your time wisely
5. you consolidate tasks
6. you evaluate the sales benefits of all tasks and eliminate those that are unimportant
7. you delegate, share or negotiate tasks with your line manager
8. you trade off or share tasks with other team members
9. you monitor and review time management against sales targets
10. you are flexible but remain in control at all times
11. you maintain a focus upon personal and organisational performance targets or objectives

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n.e.c.

Suite Sales 2010

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