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**Overview**

The focus of this standard is on the development of sales activity plans that are effective in delivering sales success. The standard includes producing a plan to achieve sales targets, considering the frequency and level of sales activity required, and building in allowances for potential problems. This standard is for sales professionals.

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**Performance  
criteria**

- You must be able to:
- P1 use information about customers, competitors and markets to make informed decisions about the development of the sales activity plan
  - P2 review the profitability and sustainability of products and/or services within the portfolio and determine selling priorities
  - P3 identify and evaluate the range, nature and frequency of sales activities needed to achieve sales targets
  - P4 produce a sales activity plan with due regard to legal, regulatory, political, technical and ethical considerations
  - P5 identify the key resource and budget requirements for implementing the plan, taking account of the number, size and location of customers
  - P6 monitor and control key performance indicators for measuring the success of the plan
  - P7 anticipate and identify potential problems that might arise to challenge the achievement of the plan and find solutions to them
  - P8 consult colleagues about the plan and adjust it accordingly
  - P9 communicate the plan to stakeholders and gain commitment to the implementation and achievement of the plan and targets
  - P10 evaluate the plan for sales success and identify appropriate actions to bring the plan back on track where necessary

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**Knowledge and understanding**

**You need to know and understand:**

- K1 legal, ethical and regulatory requirements of the industry/sector
- K2 competitor sales activities in the industry/sector
- K3 the organisation's marketing and sales strategies and how the sales activity plans are based on these
- K4 the principles of sales activity planning
- K5 different models, tools and templates for sales activity plans
- K6 the factors to be considered when reviewing the profitability and sustainability of products and/or services
- K7 methods of communicating and consulting with colleagues about the development of sales activity plans
- K8 what resources are available to implement sales activity plans
- K9 how to take account of budgetary information and constraints when developing a sales activity plan
- K10 how to identify the resources necessary for the implementation of the sales activity plan
- K11 how to monitor and evaluate sales activity plans
- K12 organisational practices for monitoring and controlling sales activities
- K13 the potential risks and issues that can arise and how to overcome them

CFASAL006  
Plan sales activities



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<b>Original URN</b>	CFASLS24
<b>Relevant occupations</b>	Marketing and sales managers; Business sales executives; Sales accounts and business development managers; Telephone salespersons; Sales related occupations
<b>Suite</b>	Sales (2013)
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