



**Specification**

**Level 6**

**Sales and  
Sales Management  
Qualifications**

**Valid from 01.01.18  
Version 5**

**Ofqual regulated**

# ISM

The Institute of Sales Management (ISM) is the professional membership body for salespeople. Our mission is to promote standards of excellence in sales and enhance the status of sales as a profession.

ISM members are drawn from every sector of industry and commerce. From those just embarking upon a sales career through to senior and experienced sales managers and directors, they share a commitment to upholding the standards of professionalism and integrity that are all hallmarks of sales success. We are recognised by the English government regulatory body Ofqual as an awarding organisation to offer qualifications in Sales and Sales Management.

To find out more about what we do, visit our website at [www.ismprofessional.com](http://www.ismprofessional.com) .

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# Introduction

This booklet is to inform ISM learners and centres about the delivery and assessment of the ISM Level 6 qualifications on the Qualifications and Credit Framework (RQF). The latest version of this document will always be posted on the ISM website at [www.ismprofessional.com/qualifications](http://www.ismprofessional.com/qualifications) . It should be read in conjunction with the Centre Guide which gives detailed guidance on running the qualifications in your centre. The Centre Guide is available on request please email; [education@ismprofessional.com](mailto:education@ismprofessional.com)

## REGULATED QUALIFICATIONS FRAMEWORK (RQF)

The RQF provides a single framework for cataloguing all qualifications regulated by Ofqual.

There are eight levels of the RQF, underpinned by three 'entry' levels. A qualification's level indicates the difficulty and complexity of the knowledge and skills associated with the qualification.

The size of the qualification is determined by the estimated number of study hours both supervised and self study a typical learner will need to achieve the qualification is expressed in terms of Total Qualification Time (TQT).

For further information on the RQF, please visit Ofqual's website:  
<https://www.gov.uk/find-a-regulated-qualification>

## Who are the qualifications aimed at?

The level 6 qualifications have been approved for use with the following age group:

- 19+

Level 6 qualifications are Vocationally Related Qualifications designed for senior sales managers or sales directors.

We do not specify entry requirements for these qualifications, but centres are required to ensure that learners admitted to the programme have sufficient experience, aptitude and ability at the right level to undertake the learning and assessment.

## Qualification definitions

There are three sizes of qualifications in the RQF: Awards, Certificates and Diplomas. These are determined by the total number of credits for the units that make up the qualification. An Award is between 1 and 12 credits, a Certificate between 13 and 36 credits and a Diploma 37 credits or more.

The terms Award, Certificate and Diploma do not describe qualification levels. It is possible to have an Award at level 6, for example, and a Diploma at level 3.

This specification details the ISM's qualifications at level 6. Other specifications are available for other levels.

## Unit definition

ISM qualifications are composed of one or more unit(s). A unit is defined as a coherent and explicit set of learning outcomes and assessment criteria with a title, credit value and level. The term 'unit' refers to a unit of assessment. ISM units share a common set of characteristics, are submitted on a template and can be combined to support the creation of coherent programmes of learning and qualifications.

## Delivering the qualifications

The ISM does not prescribe any method of delivery to training organisations, which are free to use any methods of delivery suitable to their learners. Methods may include open, distance, blended or online learning. In qualifications with more than one unit, units may be delivered and assessed in any order.

## Grading

Each unit and each qualification is graded Pass/Fail. A Pass confirms that the required criteria for achievement have been met. Where qualifications consist of more than one unit, the learner must pass each unit to pass the qualification.

# **Total Qualification Time (TQT) and Guided Learning hours (GLH)**

TQT is comprised of GLH which is under the immediate guidance of a trainer or supervisor including induction, face to face training, e-learning with the co-presence of learner and tutor, invigilated exams and non-supervised directed, private and online study and non-invigilated assessment. Qualifications can be delivered in a class room or through e-learning.

## **Credit**

Each ISM qualification has a Credit value. Credit is calculated by dividing the TQT by ten. For example a qualification with TQT of 120 hrs would have a credit value of 12.

## **Progression**

The qualifications provide opportunities for progression to other qualifications at the same or higher levels and they support learners in meeting the knowledge and skills requirements for employment within sales. A number of single-unit level 6 Awards can be built up over time to progress to the level 6 Certificate in Strategic Sales Management or the larger level 6 Diploma in Strategic Sales Management.

## **Language**

The qualification is offered in the medium of the English language.

# Level descriptor

This qualification has been designed to suit learners working towards a level 6 qualification. Level descriptors are divided into two categories:

- I. Knowledge and understanding
- II. Skills

There is a knowledge descriptor and a skills descriptor for each Level within the framework. The descriptors set out the generic knowledge and skills associated with the typical holder of a qualification at that Level.

For more information please follow this link to the Ofqual website:

[https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/461637/qualification-and-component-levels.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/461637/qualification-and-component-levels.pdf)

## Qualification overview

There are 10 ISM qualifications available at this level: 8 single-unit Awards, 1 composite-unit Certificate and 1 composite-unit Diploma. Units can be built up over time to contribute to the Certificate and Diploma.

The qualification titles given below are the titles as they will appear on the certificate when awarded to the learner. The qualification reference number is the number allocated to the qualification by Ofqual upon accreditation. Each unit also has a unique RQF unit number which can be found within the content of each unit in this specification.

Qualification title	ISM qualification code	Ofqual qualification reference number (QAN code)	Credit
Level 6 Award in Leading a culture for responsible selling	A601	600/1598/6	7
Level 6 Award in Leadership and management in sales	A602	600/1599/8	7
Level 6 Award in Planning and implementing sales and marketing strategy	A603	600/1605/X	7
Level 6 Award in Salesforce organisation	A604	600/1606/1	7
Level 6 Award in Sales forecasting and budgeting	A605	600/1607/3	7
Level 6 Award in Developing strategic relationships with major customers	A606	600/1608/5	7
Level 6 Award in Managing sales-related change	A607	600/1609/7	7
Level 6 Award in Developing and using customer insight	A608	600/1610/3	7
Level 6 Certificate in Strategic Sales Management	C601	600/1612/7	28
Level 6 Diploma in Strategic Sales Management	D601	600/1611/5	56



## Unit overview

The following units are offered as single-unit Awards and within the Certificate:

Unit title	Unit level	ISM unit number	RQF reference number	unit	Credit	Assessment method(s)
Leading a culture for responsible selling	6	U601	A/503/0875		7	Work based evidence or assignment
Leadership and management in sales	6	U602	F/503/0876		7	Work based evidence or assignment
Planning and implementing sales and marketing strategy	6	U603	J/503/0877		7	Work based evidence or assignment
Salesforce organisation	6	U604	L/503/0878		7	Work based evidence or assignment
Sales forecasting and budgeting	6	U605	R/503/0879		7	Work based evidence or assignment
Developing strategic relationships with major customers	6	U606	J/503/0880		7	Work based evidence or role play assignment
Managing sales-related change	6	U607	L/503/0881		7	Work based evidence or assignment
Developing and using customer insight	6	U608	R/503/0882		7	Work based evidence or assignment

# Rules of combination for composite qualifications

Unit combinations for qualifications consisting of more than one unit at this level are listed below and on the following page.

The **Level 6 Certificate in Strategic Sales Management** consists of a combination of units. To achieve the certificate, learners must complete unit U601 and any three optional units, giving 28 credits.

## Level 6 Certificate in Strategic Sales Management

Unit code	Unit title	Mandatory/ Optional	Assessment	Credit
U601	Leading a culture for responsible selling	Mandatory	Work based evidence or assignment	7
U602	Leadership and management in sales	Optional	Work based evidence or assignment	7
U603	Planning and implementing sales and marketing strategy	Optional	Work based evidence or assignment	7
U604	Salesforce organisation	Optional	Work based evidence or assignment	7
U605	Sales forecasting and budgeting	Optional	Work based evidence or assignment	7
U606	Developing strategic relationships with major customers	Optional	Work based evidence or assignment	7
U607	Managing sales-related change	Optional	Work based evidence or assignment	7
U608	Developing and using customer insight	Optional	Work based evidence or assignment	7

The **Level 6 Diploma in Strategic Sales Management** consists of a combination of units. To achieve the Diploma, learners must complete each of Units U601-U608, giving 56 credits.

### Level 6 Diploma in Strategic Sales Management

Unit code	Unit title	Mandatory/Optional	Assessment	Credit
U601	Leading a culture for responsible selling	Mandatory	Work based evidence or assignment	7
U602	Leadership and management in sales	Mandatory	Work based evidence or assignment	7
U603	Planning and implementing sales and marketing strategy	Mandatory	Work based evidence or assignment	7
U604	Salesforce organisation	Mandatory	Work based evidence or assignment	7
U605	Sales forecasting and budgeting	Mandatory	Work based evidence or assignment	7
U606	Developing strategic relationships with major customers	Mandatory	Work based evidence or assignment	7
U607	Managing sales-related change	Mandatory	Work based evidence or assignment	7
U608	Developing and using customer insight	Mandatory	Work based evidence or assignment	7

# Assessment

All units will be internally assessed by the centre and externally verified by the ISM. No units are assessed by examination in these qualifications. Learners will need to show that they meet each of the assessment criteria detailed within each unit, to the required standard for the level of the unit. For further details on the assessment please refer to the ISM Centre Guide.

## Centre assessment staff

The centre is required to appoint at least one Assessor who is responsible for assessing the learning against the assessment criteria in the unit. The Assessor may be the teacher or trainer who delivers the learning.

The centre is also required to appoint an Internal Quality Assurer who is accountable for the verification of the all assessment decisions in the centre for the ISM qualification(s). The Assessor and Internal Quality Assurer roles must be carried out by different people. If your centre has difficulty finding a suitable person for the Internal Quality Assurer role please contact the ISM at [education@ismprofessional.com](mailto:education@ismprofessional.com) or phone 01582 227 801.

## ISM assessment staff

An ISM-appointed External Quality Assurer is linked to the centre for the purposes of support, guidance and external verification. The External Quality Assurer checks that the centre is applying the correct standards and either approves the centre's assessment decisions or gives guidance until centre decisions are deemed to be accurate.

## Assessment routes

There are four possible routes to fulfilling the assessment criteria for each unit, and each route is equally valid:

- Route A is via Work Based Evidence
- Route B is via Model Assignment
- Route C is via Contextualised Model Assignment
- Route D is via Centre Devised Assignment

One route must be chosen per learner per unit. A centre with more than one learner may assess some learners through one route and other learners through another route at the same time or over a period of time. Learners taking qualifications consisting of more than one unit can provide evidence through one route for one unit and through other routes for other units. However, where the route chosen does not cover adequately some of the assessment criteria, evidence from other routes may be added to fulfill the assessment criteria.

Centres are asked to indicate which route(s) they intend to offer, when applying for ISM centre recognition. Model Assignments are provided on request.

## **Route A: Work Based Evidence**

This route is available for learners employed in sales who have the opportunity to produce work based evidence showing that they have met the assessment criteria through their employment. Evidence must be generated through their day to day work and may take any format, as long as it produces relevant tangible evidence which can be accessed by a third party.

Examples of types of evidence are:

- Witness statements
- Observations of performance in the work environment
- Learner statements
- Written evidence such as diaries, emails, reports, presentation slides
- Photos
- Video recordings
- Interview or viva voce
- Project documentation
- Verbal presentations

This list is not conclusive.

Work based evidence may be built up over time and assessment criteria in the unit can be ‘ticked off’ gradually until they are all met. At the time of assessment against the particular assessment criterion, evidence must be current i.e. produced within the past three years. Evidence must be authentic i.e. produced by the learner.

Work based evidence should be assessed holistically, and one piece of evidence may cover more than one assessment criterion. One piece of evidence may be used for assessment across different units and across different qualifications, provided it meets the relevant assessment criteria.

## **Route B: Model Assignment**

A Model Assignment is available for each internally assessed unit, which provides the learner with the opportunity to meet all the assessment criteria in the unit. The Model Assignment consists of one or more tasks, based on a fictional yet realistic sales situation. Centres are responsible for providing the Model Assignment to learners and for setting deadlines, monitoring progress and assessing learner work against the assessment criteria.

Centres use the ISM Model Assignment exactly as they receive it, with no amendments. The Model Assignment will be sent to centres on request.

## **Route C: Contextualised Model Assignment**

A Contextualised Model Assignment gives centres the opportunity of adapting the Model Assignment, to tailor it to the needs and interests of the centre or learners. For example the centre may change the setting of the Model Assignment from a car sales situation to a pharmaceuticals sales situation. A Contextualised Model Assignment must enable learners to meet all of the assessment criteria for the unit and must be approved by the ISM in advance of issuing it to learners.

## **Route D: Centre Devised Assignment**

Centres can create their own Centre Devised Assignment from scratch using the ISM Assignment Template. A Centre Devised Assignment must enable the learner to meet all of the assessment criteria for the unit and must be approved by the ISM in advance of issuing it to learners. The assignment may consist of one or more tasks.

Centres choosing this route must ensure that each Centre Devised Assignment:

- permits the learner to meet all of the assessment criteria in the unit
- is relevant to the content of the unit
- has clear instructions to the learner as to what is expected
- has clear instructions to the learner regarding the duration of the assignment (if it is a timed activity), and what reference or other material they may use (if any) to complete it
- contains language free from any bias
- contains language and technical terms at the appropriate level for the learner

## **Recognition of Prior Learning and Achievement**

Within this suite of qualifications, learners have the opportunity to build their achievements from a single unit into a composite qualification. Learners may apply via their centre to claim for credit transfer and exemption where they have completed relevant units and qualifications from other Awarding Organisations. Credit transfer in the RQF will be based on confirmation of achievement of RQF units.

There will still be instances where learners will wish to claim recognition of prior learning which has not been formally assessed and accredited. In those instances, centres are free, after discussion and agreement with the ISM, to allow these learners direct access to the relevant assessment for the unit, without unnecessary repetition of learning. Details of the process for recording such RPL (Recognition of Prior Learning) are available from the ISM.

## Centre approval

Centres must pass through the ISM centre approval process to become an ISM Recognised Centre before offering any RQF qualifications. An application form is available from the ISM email [education@ismprofessional.com](mailto:education@ismprofessional.com).

## Support and guidance for centres

Each centre is allocated an ISM External Quality Assurer whose role is to support and advise all of the centres in the region as well as to verify assessment decisions. The External Quality Assurer will contact the centre at the Centre Approval stage so that support may start immediately.

A handbook is provided to centres to give guidance on administrative procedures.

Study guides tailored to each unit are available to support learners.

For up to date details of the above support, visit the ISM website at [www.ismprofessional.com](http://www.ismprofessional.com).

## Equality of opportunity

The ISM endeavours in setting the structure and content of our qualifications, and in its processes and arrangements for assessment and awarding, to:

- Ensure access and equality of opportunity wherever possible without affecting the integrity of the qualification
- Not create unnecessary barriers to achievement.
- Guarantee fair assessment for all candidates, including those with particular assessment requirements.
- Comply with the requirements of equalities legislation in force from time to time
- Ensure that it does not discriminate on the grounds of race, disability, gender and transgender, political or religious belief, age, marital/civil partnership status, sexual orientation, or on any other ground or status
- Ensure that all staff and associates are aware of the policy and receive adequate training to ensure its implementation and compliance

# Units

## Unit U601: Leading a culture for responsible selling

Unit aim				<p>The aim of this unit is to support knowledge and understanding necessary to identify and implement an ethically, legally and socially responsible sales culture in a sector.</p> <p>Organisations must obey the law in key areas such as health and safety, employment, finance and company law. Most importantly for salespeople, organisations must obey contract law and avoid illegal activity such as misrepresentation. They are also responsible for the security of customer data. Most organisations have to work within specific regulations and ethical frameworks for their sector.</p>	
Level:	6	ISM Unit no.	U601	RQF unit reference no.	A/503/0875
Credit value			7	Guided Learning Hours	35
Mapping to National Occupational Standards				Sales NOS 7.7, 7.8	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand the impact of a culture for responsible selling on an organisation	1.1. Evaluate the legal, regulatory, ethical and socially responsible requirements relevant to sales in an organisation	<p>Compare the differences between legal, regulatory, ethical and social responsible requirements on the activities of an organisation. Consider the macro environment (PESTEL)</p> <p>Legal areas and Laws that affect the organization- industry codes of conduct- Corporate Social Responsibility</p>



	<p>1.2. Evaluate the impact of legal, regulatory, ethical and socially responsible principles on sales practice</p> <p>1.3. Analyse organisational culture and its impact on responsible selling</p> <p>1.4. Explain practices that might bring selling into disrepute</p> <p>1.5. Evaluate legal and regulatory requirements governing contracts between suppliers and customers</p>	<p>Risk analysis techniques McKinsey 7 S framework can be used as an analytical approach to show how compliance or non-compliance would affect the organisation.</p> <p>The factors that influence an organisation's culture. Charles Handy's categorisations of organisation culture. Models of organisation culture including Deal and Kennedy, Hofsted, Schien and Carmazzi. Johnson and Schole's cultural web</p> <p>Concepts of misrepresentation, violation of codes of conduct, failure to honour commitments, unlawful conduct, disregard of company policy and excessively high pressure selling.</p> <p>Describe the elements of a legally binding contract. Define Terms and Warranties and how these are differentiated within a contract. Use the sale of goods act to explain implied terms. Use the Unfair Contract Terms Act to demonstrate how terms cannot be excluded. Discuss the various forms of contract discharge including performance, agreement, frustration and breach. Discuss a range of remedies for breach of contract including damages, action for price, specific performance and injunction.</p>
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	<p>1.6. Critically evaluate an organisation's policies and procedures to ensure ethical, legal and regulatory requirements are met</p> <p>1.7. Analyse the consequences for self, the employer and the customer of non-compliance with legal, regulatory, ethical and socially responsible requirements</p>	<p>Discuss the range of policies an organisation has to ensure conformance to the areas it needs to be compliant with including corporate governance, management processes, training &amp; development and cultural expectations.</p> <p>Introduce the concept of stakeholders and how they have a range of expectations upon the organisation. Show how you can utilise a table similar to risk analysis to analyse non-compliance effects on stakeholders.</p>
<p>2. Understand how to lead a culture for responsible selling</p>	<p>2.1 Evaluate methods to gain commitment to a vision for a culture for responsible selling</p> <p>2.2 Evaluate methods to develop policies and procedures to ensure an organisation has a culture of responsible selling</p> <p>2.3 Evaluate methods to support the sales team in applying a responsible culture in sales</p> <p>2.4 Analyse personal behaviours and actions that reinforce a culture of responsible selling</p>	<p>Discuss the concept of leadership and how leaders influence the behaviour of people. Discuss the difference between transformational and transactional leadership. Use a range of models to define leadership style for example Goleman and Mintzberg.</p> <p>Explain what policy and procedures need to be considered for compliance, and give examples of those which need to be developed including entertainment, pricing, sales pipeline, training and development, discipline and grievance policies.</p> <p>Identify both the leadership characteristics and the management actions and styles that are conducive to allowing staff to sell responsibly</p> <p>Demonstrate the principles of a personal development plan in order to develop the skills and attributes necessary to lead a responsible sales team and show how to build a personal development plan.</p>

<p>3. Know how to respond to challenges when implementing a culture for responsible selling</p>	<p>3.1 Analyse possible challenges to the implementation of a culture for responsible selling</p> <p>3.2 Evaluate possible proactive and reactive solutions to challenges to the implementation of a culture for responsible selling</p>	<p>Discuss a range of models which can help elicit challenges to a responsible selling culture which include Johnson and Schole’s cultural web, McKinsey 7S model and Lewin’s a force field analysis.</p> <p>Include training, codes of conduct, restructuring, recruitment, telecommunications, strategic and tactical plan changes.</p> <p>Discuss methods to evaluate the proposed solutions which include feasibility, acceptability, viability, commitment, financial evaluation and risk analysis.</p>

## Unit U602: Leadership and management in sales

Unit aim				<p>The aim of this unit is to support knowledge and understanding and develop the skills necessary to provide leadership and management to the members of the salesforce.</p> <p>You need to be aware of culture and diversity and be sensitive to the individual and corporate needs of the salesforce whilst focusing on the achievement of sales objectives.</p>	
Level:	6	ISM Unit no.	U602	RQF unit reference no.	F/503/0876
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 4.1	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand leadership in sales	1.1 Evaluate the relationship between leadership and management in sales 1.2 Evaluate leadership styles and their impact on the sales team and individuals 1.3 Discuss why leadership styles need to be adapted in different situations 1.4 Compare and contrast transformational and transactional leadership 1.5 Evaluate skills required of a leader	Role of a leader / Role of a Manager Different leadership styles - Autocratic, Democratic and Laissez-Faire styles of leadership Benefits and Advantages of different leadership styles. Transformational and Transactional leadership Attributes of a good leader: Vision, motivation, communication...
2. Understand management in sales	2.1 Evaluate management styles and their impact on the sales team and individuals	Functions of Management (Henri Fayol and Drucker) Rensis Likert Behaviour Theory

	2.2 Evaluate possible tools of management	<p>Theory X/Theory Y</p> <p>Management Tools e.g. Planning, setting objectives, monitoring, resource allocation, influencing and negotiation</p> <p>John Adiar's Action Centred Leadership</p> <p>Coaching, GROW Model</p> <p>Motivation: Maslow, Herzberg, Expectancy theory</p>
3. Understand how to contribute to the direction of the organisation	3.1 Evaluate ways to contribute to the organisation's vision, mission, aims and objectives	<p>Mission Statement/Values</p> <p>Strategy v tactics</p> <p>Strategy Implementation (objectives, teams, resources, evaluation and control)</p>
4. Be able to review own leadership and management skills	<p>4.1 Critically evaluate own values, motivations and limitations in leadership and management</p> <p>4.2 Construct a personal development plan to improve own leadership and management skills</p>	<p>Benefits of Personal Development Planning</p> <p>Objectives of a Personal Development Plan</p> <p>Personal SWOT</p> <p>Continuous Personal Development plan</p>

## Unit U603: Planning and implementing sales and marketing strategy

Unit aim				The aim of this unit is to support knowledge, understanding and skills to develop sales and marketing strategies and plans in an organisation.	
Level:	6	ISM Unit no.	U603	RQF unit reference no.	F/503/0877
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 2.2, Marketing NOS 7.1.1	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand sales and marketing strategy	1.1 Evaluate the links between corporate strategy and sales and marketing strategy  1.2 Evaluate strategies for competitive advantage, growth, markets and different market positions  1.3 Evaluate methods for setting primary sales and marketing objectives  1.4 Explain how to select criteria for evaluating strategic options and how to use them to make decisions  1.5 Critically evaluate the impact of technological advances in strategic sales and marketing	The nature of strategy . The alignment of corporate and sales and marketing strategy  Strategic analysis: PESTLE, Porter's 5 forces and sources of competitive advantage  SMART objectives , Porter's generic competitive strategies  Strategic options for products, markets, growth. Use of analysis tools to evaluate strategic options: Boston Matrix, Ansoff matrix  Electronic sales channels, sales force automation, social media, digital communication, virtual offices

	<p>1.6 Evaluate methods to apply sales and marketing strategies to operations</p> <p>1.7 Evaluate sales and marketing theories for small and medium enterprises (SMEs)</p>	<p>Operations will include an updated forecast that leads to plans for; sales, production, financial.</p> <p>Segmentation, targeting and positioning</p>
<p>2. Understand strategic sales and marketing planning</p>	<p>2.1 Evaluate the concepts of strategic sales and marketing planning</p> <p>2.2 Evaluate the need for and the scope of strategic sales and marketing planning</p> <p>2.3 Evaluate audit and analysis in strategic sales and marketing planning</p> <p>2.4 Evaluate the impact of future challenges and issues in strategic sales and marketing planning</p>	<p>The function of strategic sales and marketing planning. Customer and market centric</p> <p>Scope of audit The SOSTAC framework</p> <p>Analysis tools used in audit Use of SWOT analysis</p> <p>Contingency planning Scenario analysis</p>
<p>3. Understand the implementation of a sales and marketing strategy</p>	<p>3.1 Evaluate methods for the implementation of a sales and marketing strategy</p> <p>3.2 Evaluate methods for monitoring and evaluating the implementation of a sales and marketing strategy</p>	<p>Conditions required for successful implementation The implementation process</p> <p>Organisational effectiveness: McKinsey's 7S framework The strategy evaluation process: benchmarking objectives, performance measurement, variance analysis, corrective action</p>

4. Understand the implementation of sales and marketing plans	<p>4.1 Evaluate methods for implementation of a strategic sales and marketing plan</p> <p>4.2 Evaluate methods for monitoring and evaluation the implementation of a strategic sales and marketing plan</p>	<p>Action oriented plans Budgets, Sales forecasts Communications planning</p> <p>Quantitative and qualitative measures Information gathering and feedback</p>



## Unit U604: Salesforce organisation

Unit aim				The aim of this unit is to support knowledge and understanding and develop the skills necessary to be able to manage salesforce organisation. Managers must decide on the most appropriate use of resources and the most efficient work methods to achieve sales targets.	
Level:	6	ISM Unit no.	U604	RQF unit reference no.	L/503/0878
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 2.5	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1.Understand how to organise the salesforce	<p>1.1. Evaluate issues relating to health and safety, equality and diversity when planning for salesforce structures, procedures and activities</p> <p>1.2. Analyse different ways in which human, financial and capital resources can be deployed in the sales force</p> <p>1.3. Evaluate ways of making use of specialist expertise in relation to recruiting, selecting and keeping members of the sales force</p>	<p>Show how health and safety, equality and diversity are integral to the role of sales-force management. Address the various aspects of employment law which affect the sales team.</p> <p>Calculations to quantify the number of sales people required. Territory design. Compensation for salespeople</p> <p>Process of recruitment including external sourcing and internal promotion. Use of job and person specifications Discuss training and development of teams using both formal and informal approaches and the importance of individual and team development. Coaching, motivation and compensation.</p>

	<p>1.4. Evaluate different working practices and methods including central base and remote working in the sales force</p> <p>1.5. Evaluate quality assurance processes for the management and use of resource</p> <p>1.6. Analyse technology used by the salesforce and how it can be used for remote working</p>	<p>Sales force organisation, reporting systems, use of CRMs, meetings.</p> <p>Setting of standards and measurement of adherence to these standards Discuss the concept of continuous improvement and some of the techniques used which include just in time, kaizen, quality gap analysis, total quality management, Six Sigma and EFQM. Discuss the concept of benchmarking as a method of quantifying high quality.</p> <p>Show the contribution of technology to the organisation as a whole as a form of developing competitive advantage and demonstrate how this is integral to the sales-force, especially for remote working.</p>
<p>2.Understand internal and external factors affecting the organisation of the salesforce</p>	<p>2.1 Analyse organisation strategies which may impact on future sales force planning</p> <p>2.2 Analyse legislative and regulatory requirements and codes of practice relating to employment in the sales force</p> <p>2.3 Analyse trends and developments in the sector which might impact upon future salesforce planning</p>	<p>Discuss the concept of strategy and show how strategy is designed to develop organisational competitive advantage. Use Michael Porter's model of Three Generic Strategies to show alternative methods for developing organisational strategy.</p> <p>Investigate the broad range of legislation and regulatory requirements imposed upon organisation as well as the codes of practice that relate to employment of sales teams.</p> <p>Show the importance of proactively evaluating potential future changes in the trading environment on the development of sales strategy. Evaluation tools include; Macro (PESTEL) analysis and Porters Five</p>

		Discuss a range of methods for the consolidation of information including SWOT analysis and 6 C's framework
3.Be able to use sales planning and sales trends in order to inform salesforce resourcing	<p>3.1 Use sales planning and forecasting information to assess the scope of resource requirements for the sales force</p> <p>3.2 Analyse salesforce resource requirements and identify potential gaps in resources that need to be filled to achieve sales targets</p>	<p>Demonstrate the importance to the organisation of good quality plans and accurate sales forecasts.</p> <p>Ongoing monitoring and reviewing. Discuss the objective analysis of salesforce capability and resource in order to achieve the sales line including a range of methods for the analysis</p>
4.Be able to review salesforce structure	<p>4.1 Evaluate current salesforce structure against future requirements</p> <p>4.2 Recommend resources to support the development of the salesforce for future requirements</p>	<p>Demonstrate the importance of evaluating the sales structure currently in existence and comparing it to the future requirements of the proposed business and sales strategy.</p> <p>Discuss the importance of being proactive or pre-emptive in analysing the market requirements and making the necessary adjustments to the salesforce and sales structure. Demonstrate Piercy and Lane's checklist for organisations which have low market IQ and consequently suffer as a result. Discuss the evolution of sales relationships from transactional towards key account management approaches as a method for developing repeat business and the consequential effects it has on resource availability and resource type.</p>

## Unit U605: Sales forecasting and budgeting

Unit aim		This unit aims to provide the knowledge and understanding needed to prepare sales forecasts and budgets. It requires knowledge of forecasting techniques and methods for preparing a budget.			
Level:	6	ISM Unit no.	U605	RQF unit reference no.	R/503/0879
Credit value		7	Guided Learning Hours		30
Mapping to National Occupational Standards		Sales NOS 3.1, 3.2			

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand the impact of sales forecasting on organisational planning	1.1 Evaluate the impact of sales forecasting on organisational planning  1.2 Evaluate the applicability and usefulness of short-, medium- and long-term sales forecasts on different parts of the organisation  1.3 Evaluate the impact of sales forecasting on sales managers and their sales objectives, targets, budgeting and remuneration systems	The purpose of sales forecasting Impact of sales income on the organisation  What sales forecasting can achieve within each time horizon Organisational uses of sales forecasting including different stakeholders  Relationship of forecasting to target-setting and the sales force
2. Understand factors that may affect sales trends	2.1 Evaluate internal factors that may affect sales trends  2.2 Evaluate external factors that may affect sales trends	McKinsey's 7S framework  External factors – STEEPLE Competition – e.g. Porter five forces

3. Understand qualitative and quantitative techniques for forecasting sales	<p>3.1 Evaluate qualitative techniques for forecasting sales</p> <p>3.2 Evaluate quantitative techniques for forecasting sales</p> <p>3.3 Evaluate the use of computer software for forecasting sales</p>	<p>Advantages and disadvantages of forecasting techniques that use the opinions, intuition and knowledge of experienced people</p> <p>Advantages and disadvantages of forecasting techniques that use historical and other factual data</p> <p>Use of quantitative data, data manipulation, speed and accuracy, visual representation</p>
4. Understand the importance of monitoring actual sales against forecast sales	<p>4.1 Evaluate the importance of measuring and monitoring actual sales against forecast sales</p> <p>4.2 Evaluate methods for measuring and monitoring actual sales against forecast sales and for revising sales forecasts</p>	<p>Accountability, impact on strategy and operations contingency planning.</p> <p>Control charts Z charts Error analysis</p>
5. Understand budgeting methods	<p>5.1 Evaluate budgeting methods and select a method likely to give an accurate budget to support sales forecasts</p> <p>5.2 Evaluate methods for allocating the sales budget to sales teams</p> <p>5.3 Evaluate methods to identify causes of variances between budget and actual expenditure</p>	<p>Budgeting methods including - incremental, activity -based, zero –based, performance based.</p> <p>Budgeting to support targets, quotas and potential</p> <p>Variance analyses, external v internal factors</p>

	and to analyse possible actions to address variances	
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## Unit U606: Developing strategic relationships with major customers

Unit aim				<p>This unit aims to provide the knowledge and skills needed to manage and develop business relationships at a strategic level with major customers. This is sometimes referred to as relationship marketing/ selling, and involves developing a two-way partnership with those customers selected for their current and/or potential importance to the organisation.</p> <p>It is recognised that such relationships often involve a team of experienced individuals with responsibility for retaining and developing a profitable business relationship with the customer.</p>	
Level:	6	ISM Unit no.	U606	RQF unit reference no.	J/503/0880
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards			Sales NOS 9.2, 9.7, Marketing NOS 7.1.3		

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand the principles of developing strategic relationships with major customers	<p>1.1 Explain the principles of developing mutually beneficial relationships with major customers</p> <p>1.2 Evaluate distinctions between transactional selling and major customer management</p> <p>1.3 Evaluate advantages and dangers of major customer management to own organisation and customer organisations</p>	<p>Classification of key accounts and how they progress from being a client to strategic partner.</p> <p>Differentiate between transactional and key account management selling including dimensions such as sales style, nature of relationships, goals and objectives and the nature of sales-force.</p> <p>Evaluate the advantages and risks from both the sellers and buyers perspective of a key account strategy considering aspects such as the benefits of close relationships, increased revenue, reduced cost base, synergistic</p>

	<p>1.4 Develop criteria to use to select major customers based on strategic long term value of customers</p> <p>1.5 Analyse methods to obtain buy-in from senior management and colleagues for major customer management</p> <p>1.6 Explain the stages of major customer relationship development</p> <p>1.7 Evaluate behaviours which build up a relationship of trust with a major customer</p>	<p>operations, integrated systems, increased dependency, excessive demands and costs of personalisation.</p> <p>Discuss the importance of an objective approach to classifying customers as key accounts using a range of criterion which include customer orientation, customer requirements, development opportunities, strategic growth benefits and profitability.</p> <p>Discuss the conditions that enhance the likelihood of success in gaining organisational buy-in such as integration of key account programs, increased senior management understanding, clear lines of communication, establishment of objectives and goals, harmonious working relationship between sales and the organisation and a clear definition of customers classified as key accounts.</p> <p>Use McDonald and Roger's model to explain the progression of the key accounts through the various stages which include Pre-KAM, Early KAM, Mid KAM, Partnership KAM and Synergistic KAM. For each stage address the characteristics and the benefits to both parties.</p> <p>Demonstrate how the behaviour of individuals within your organisation can build a deeper relationship through the formation of trust, technical support, resource support, service level delivery and risk reduction.</p>
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<p>2. Be able to identify major customers and develop major customer plans that are mutually beneficial</p>	<p>2.1 Identify the customer(s) which fulfil the organisation's criteria to be classed as a major customer</p> <p>2.2 Analyse the major customer's business and their corporate business and marketing strategy</p> <p>2.3 Analyse the current and future strategic and operational business challenges faced by the major customers</p> <p>2.4 Identify and agree prioritised common business objectives between own organisation and the major customer, which are consistent with both organisations' financial objectives and business strategies</p>	<p>Organisation's criteria for classification which include a profit centre, high sales value, resource requirements and congruence of strategic goals. Cheverton's KAISM model for classification of key accounts based upon customer attractiveness and relative attractiveness.</p> <p>SOSTAC model Porter's value chain</p> <p>Role of the key account manager Market research PESTEL and Porter's five forces SWOT analyses</p> <p>Demonstrate the importance of alignment between your organisation's and your customer's vision and objectives.</p> <p>Discuss the concepts of collaborations, alliances and joints developments and explore</p>

	<p>2.5 Assess with the major customer strategic options towards achieving the common business objectives which involve mutual working</p> <p>2.6 Work in partnership with the major customer to develop a plan and actions towards addressing the identified challenges and common objectives</p>	<p>possible areas where this can take place between the two organisations. Discuss the concept of asset sharing and asset utilisation.</p> <p>Rigorous planning and KPIs, Regular monitoring and reviews</p>
<p>3. Be able to develop strategic relationships with major customers to meet mutual objectives</p>	<p>3.1 Analyse expertise required in own team to work with the major customers</p> <p>3.2 Co-ordinate business functions across own organisation to develop strategic relationships with the major customers</p> <p>3.3 Evaluate opportunities for creating long term value for the major customer</p> <p>3.4 Evaluate methods for reducing risk to the major customer regarding own organisation's products and services</p>	<p>Identify expertise requirements and acquire this resource</p> <p>Analyse who else in the team needs to be involved in the account – build multi-point contact- have clear communication structures</p> <p>Define Value Drivers and explain how they contribute to competitive advantage. Use Treacy and Wiersema's Value Disciplines Michael Porter's value chain Understand the concept of lifetime value</p> <p>Define risk and control and methods of risk management that can be used. Demonstrate how control methods develop trust of you within your customer's organisation.</p>

		Demonstrate how collaboration can mitigate risk.
4. Be able to evaluate the success of strategic relationship activities and plan for future activities	4.1 Monitor and critically evaluate the outcomes of activities in developing the strategic relationship with the major customer, including the return on the investment being made	<p>Discuss what quality control is. Differentiate between quality control and quality assurance and show how this links to continuous improvement.</p> <p>Show how quality contributes to competitive advantage.</p> <p>Discuss a range of quality control systems</p> <p>Discuss procedures associated with quality assurance.</p> <p>Discuss methods to ensure quality including management commitment, understanding customer needs and perceptions, setting of standards, provision of resources, motivation, culture, consistency and adherence to standards</p> <p>Discuss the concept of continuous improvement and some of the techniques used which include Just In Time, Kaizen, Quality Gap Analysis, Total Quality Management, Six Sigma and EFQM.</p> <p>Discuss the difference between national and international standards and how these affect the markets to which salespeople sell.</p> <p>Discuss the concept of benchmarking as a method of quantifying high quality.</p>

	<p>4.2 Develop a plan to address any issues regarding the outcome of strategic relationship activities</p> <p>4.3 Develop a succession plan for maintaining a successful relationship with the major customer, with contingencies should particular individuals no longer be able to work with the major customer</p> <p>4.4 Evaluate systems for storing and planning major customer information</p>	<p>Strategic planning underpins successful KAM Kotler’s Cranfield model and reporting system.</p> <p>Discuss the range of resources that should be used in a key account plan including human, technological, financial, and marketing and operations. Focus on training and development as a way of ensuring effective utilisation of the human resource, and recommend a systematic process for identifying HR needs and fulfilling HR needs. Discuss techniques for identifying skills gaps that exist which include those related to technical skills, personal skills and management skills. Discuss mechanisms for reviewing the progress of training. Discuss approaches to recognising achievement.</p> <p>Discuss the importance of storing major customer information and being able to quickly retrieve it. Consider the types of information needed which include customer intelligence, legally required information, business driver information, financial data and personal information.</p>
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## Unit U607: Managing sales related change

Unit aim				This unit aims to provide the knowledge needed to lead sales-related change. This involves the need to communicate reasons for and benefits of change to gain commitment for the change programme.	
Level:	6	ISM Unit no.	U607	RQF unit reference no.	L/503/0881
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 4.6, 4.7, MSC NOS C5, C6	

Learning outcomes The learner will:	Assessment criteria The learner can:	Indicative content
1. Understand the forces for sales-related change in an organisation	<p>1.1 Analyse methods to identify an opportunity for sales-related change in support of an organisation's objectives</p> <p>1.2 Critically evaluate models for the achievement of sales-related change in an organisation</p>	<p>Change as a strategic issue use internal and external analyses to predict change;</p> <p>STEEPLE, Porter's Five Forces, McKinsey 7S, SWOT</p> <p>Change models –planned and emergent, hard and soft models, application in the sales function</p>
2. Understand the likely impact of sales-related change	<p>2.1 Evaluate the likely impact of planned sales-related change on the achievement of sales-related objectives and the organisation's objectives</p> <p>2.2 Evaluate the likely impact of sales-related change on individual sales people and on the sales team</p>	<p>Different types of change and the impact of change</p> <p>Strategic alignment with the organisation's objectives and impact assessment</p>

	2.3 Evaluate the likely impact of planned sales-related change on the sales team's stakeholders	How change affects salespeople and teams, how this can be assessed  Stakeholders in the sales process, their needs and relative importance, their relationship to change
3. Understand how to secure support for sales-related change	3.1 Evaluate methods to secure support for sales-related change from senior management  3.2 Evaluate methods to secure support for sales-related change from the sales team  3.3 Evaluate methods to influence stakeholders to secure support for sales-related change	Persuading people to change, openness and barriers to change, change agents and champions  Identify what senior managers and the sales team each want from sales-related change and how to approach each group for support  Approaching, engaging and influencing stakeholders
4. Understand how to manage a sales-related change	4.1 Evaluate methods to construct a plan to implement and monitor sales-related change  4.2 Evaluate how individuals in the sales team can be supported during sales-related change  4.3 Describe how to analyse the outcome of sales-related change against the change plan and the organisation's objectives	Change management audit, the politics of change, managing change in a sales environment  developing and managing a change plan  Managing people through transition  Setting targets, closing change programmes and sustaining the outcomes

## Unit U608: Developing and using customer insight

Unit aim				<p>This unit aims to provide the knowledge and skills needed to manage customer insight to assist the achievement of sales objectives.</p> <p>For the purpose of this Unit customer insight is defined as 'A deep 'truth' about the customer based on their behaviour, experiences, beliefs, needs or desires, that is relevant to the task – in this case, sales.'</p>	
Level:	6	ISM Unit no.	U608	RQF unit reference no.	R/503/0882
Credit value			7	Guided Learning Hours	30
Mapping to National Occupational Standards				Sales NOS 1.1, 1.3, 1.4	

Learning outcomes	Assessment criteria	Indicative content
The learner will:	The learner can:	
1. Understand how customer insight can contribute to sales results	1.1 Evaluate how customer insight can be used to support sales-related decisions  1.2 Evaluate the role of customer insight in achieving sales objectives	<p>Discuss what customer insight is and the importance to the business. Discuss a range of business benefits that customer insight can deliver such as pricing, proposition and process improvements. Demonstrates how customer insight can affect individual contract awards. Introduce market-based analysis such as the Boston Consulting Group and Directional Policy Matrices developed by Shell and GP.</p> <p>Understand how to define customer value. Use Treacy and Wiersema's model which defines value disciplines of operational excellence, product leadership, customer intimacy and brand leadership.</p>

	<p>1.3 Evaluate the role of customer insight in prioritising levels of customer service offered</p> <p>1.4 Evaluate the role of customer insight in contributing to the development of targeted products and services</p>	<p>Show how customer insight can identify opportunities for example in emerging markets, new market opportunities, maturing markets, consolidating and fragmenting markets.</p> <p>Use a range of models to show how customer insight can help prioritise levels of customer service on a spectrum from transactional to relationship based marketing. Show how this can help an organisation decide whether to focus on transactional sales to some customers and a relationship orientation for others.</p> <p>Use Millman and Wilson's model to explain the various stages of key account management and define how customer insights can aid the progression towards a partnership stage.</p> <p>Use Griffins model to understand how customer insight can contribute towards product development by going through three main stages. The stages are related to market information, idea generation and organisational processes. Discuss the reasons why new products often fail and demonstrate how customer insight can overcome these.</p> <p>Show how bespoke products developed for a particular customer can be integrated into the main business offering through the use of customer insight and adaptation.</p>
<p>2. Be able to analyse information to provide customer insight</p>	<p>2.1 Evaluate methods to review, develop and manage the implementation of processes to synthesise existing data into customer insight</p>	<p>Explain what knowledge management is and its dimensions, i.e. explicit and tacit giving examples of both.</p> <p>Discuss the scope of information needed that contributes to</p>





	<p>3.3 Communicate customer insight to stakeholders involved in delivering service to customers</p> <p>3.4 Communicate customer insight to marketers and Research and Development to support the development of new products and services</p> <p>3.5 Critically evaluate the contribution of customer insight to sales results</p>	<p>Demonstrate how customer insight can contribute towards marketing plans and their development using PR Smith's SOSTAC model. Show how this information can be used not only for external marketing but also for internal marketing activities</p> <p>Discuss the balance between customer requirements for product development and organisation capability to develop new products. Evaluate the questions that need to be continuously asked when undertaking product development through the use of customer insight. Utilise risk evaluation techniques to assess the consequences of poor product development processes and methods.</p> <p>Understand and give examples of both financial and non-financial measures which can quantify the contribution of customer insight and their effects on bottom-line sales results. Introduce the concept of ratio analysis using both sales revenue and profitability measures for the total market as well as product/customer/market segments. Discuss a range of techniques which include profit margin, contribution to sales, breakeven volume, margin of safety and stock turnover techniques. Consider both short and long term financial appraisal methods. Long-term methods include investment calculations and strategic lifetime of the asset, whereas short-term methods include understanding</p>
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		sunk costs, incremental costs and opportunity costs.
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